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## Business Owner Forum: Monetizing Your Life's Work

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June 27, 2019

The Atlantic Legacy Group, UBS Financial

**Steve Poulathas** will be speaking at an upcoming Business Owner Forum for UBS Financial Services Inc. on June 27, 2019 in Mount Laurel, NJ.

### Program Description

For private business owner clients at UBS, their life's work is reflected in their enterprise. Whether growing your business or considering an exit strategy, please join us on Thursday, June 27th to hear distinguished speakers around topics such as:

- Turning success into a family tradition
- Liquidity strategies for your business
- Tax and asset protection strategies for business owners
- Advanced planning before a strategic exit
- Special presentation by CyZen: practical guidance to strengthen your business' security posture and help your organization defend against attacks

### Hosts

- **Lulu X. Zappy, CLU, CFA, CFP**  
Financial Advisor  
The Atlantic Legacy Group, UBS Financial Services Inc.
- **Douglas M. Pires, CFP**  
Senior Vice President, Financial Advisor  
The Atlantic Legacy Group, UBS Financial Services Inc.

### Speakers

- **Steven S. Poulathas, Esq.**  
**Chair, Business & Corporate Department**  
**Flaster Greenberg PC**
- **Walter J. Szymanski**  
Director, M&A  
Everingham & Kerr
- **Kirsten M. Toler, CPA**  
Senior Manager, Tax  
Friedman LLP

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▪ **Jacob Lehmann**

Managing Director

CyZen, a Friedman LLP Company

**Date and Time**

Thursday, June 27, 2019

8:00 a.m. - 10:00 a.m.

**Location**

UBS Financial Services Inc.

501 Fellowship Road, 3rd Floor

Mount Laurel, NJ 08054

**RSVP**

Please contact **Jessica C. DeBear**, Team Administrator at UBS Financial at [jessica.debear@ubs.com](mailto:jessica.debear@ubs.com) or by phone at 856.988.4046 to RSVP by **Monday, June 24, 2019**.

**ATTORNEYS MENTIONED**

Steven Poulathas