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

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February 27, 2020

UBS Financial

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 to hear our distinguished speakers discuss 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 Jonathan H. Ellis (Shareholder, Flaster Greenberg PC) on the impact of the SECURE Act on retirement and estate planning**

Hosted by: The Atlantic Legacy Group

- **Lulu X. Zappy, CLU, CFA, CFP**  
Financial Advisor
- **Douglas M. Pires, CFP**  
Senior Vice President  
Wealth Management

### Speakers

- **Jonathan H. Ellis**  
Shareholder  
Flaster Greenberg PC
- **Steven S. Poulathas, Esq.**  
Chair, Business & Corporate and Taxation  
Flaster Greenberg PC
- **Walter J. Szymanski**  
Director, M&A  
Everingham & Kerr
- **Kristen M. Toler, CPA**  
Senior Manager, Tax  
Friedman LLP

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## Date and Time

Thursday, February 27, 2020

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

\*Complimentary breakfast will be served.

## Location

Flaster Greenberg PC  
1835 Market Street, Suite 1050  
Philadelphia, PA 19103

## RSVP

**Please RSVP no later than Monday, February 24 by contacting:**

### **Jessica C. DeBear**

Team Administrator

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### **ATTORNEYS MENTIONED**

Jonathan Ellis

Steven Poulathas