

# Business Owner Forum

## Monetizing your life's work

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** 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 Abel HR:** Strategies for improving productivity and profitability while saving time and money

### Hosted by

**The Atlantic Legacy Group**

### Douglas M. Pires, CFP®

Senior Vice President  
Financial Advisor

### Guest speakers

Walter J. Szymanski  
Director, M&A  
Everingham & Kerr

Kirsten M. Toler, CPA  
Senior Manager, Tax  
Friedman LLP

Steven S. Poulathas, Esq.  
Chair, Business & Corporate Taxation  
Flaster Greenberg

James W. Bell, Sr.  
Founder and President  
Abel HR, Inc.



**Tuesday, October 29**  
**8:00 - 10:00 a.m.**

### UBS Financial

501 Fellowship Rd.  
3rd Floor  
Mount Laurel, NJ 08054

Complimentary breakfast  
will be served.

### RSVP by Friday, October 25

Jessica C. DeBear  
Team Administrator  
856-988-4046  
jessica.debear@ubs.com

UBS Financial Services Inc.  
501 Fellowship Road  
Suite 302  
Mt. Laurel, NJ 08054-3419  
856-988-4046  
855-556-5624

[ubs.com/team/atlantic-legacy](https://ubs.com/team/atlantic-legacy)

This presentation is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be those of UBS Financial Services Inc. UBS Financial Services Inc. does not verify and does not guarantee the accuracy or completeness of the information presented.

The attorney who presents this seminar is independent of, and unaffiliated with, UBS Financial Services Inc. This presentation is provided for informational purposes only. As a firm providing wealth management services to clients, UBS Financial Services Inc. offers both investment advisory services and brokerage services. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that clients understand the ways in which we conduct business and that they carefully read the agreements and disclosures that we provide to them about the products or services we offer. For more information visit our website at [ubs.com/workingwithus](https://ubs.com/workingwithus).

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. ©UBS 2019. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS AG. Member FINRA/SIPC. D-UBS-E140DBF5 [Everingham & Kerr, Friedman LLP, Flaster Greenberg, Abel HR, Inc. and UBS Financial Services Inc. are not affiliated.]

