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

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