Business Owner Forum: Monetizing Your Life's Work

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 exist
- 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

- **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 or by phone at 856.988.4046 to RSVP by **Monday, June 24, 2019**.

ATTORNEYS MENTIONED

Steven Poulathas