
Business Owner Forum: Monetizing Your Life's Work

October 29, 2019

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

Hosted by

- **Douglas M. Pires, CFP**
Senior Vice President, Financial Advisor
The Atlantic Legacy Group

Speakers

- **Steven S. Poulathas, Esq.**
Chair, Business & Corporate and Taxation
Flaster Greenberg PC
- **James W. Bell, Sr.**
Founder and President
Abel HR, Inc.
- **Walter J. Szymanski**
Director, M&A
Everingham & Kerr
- **Kirsten M. Toler, CPA**
Senior Manager, Tax
Friedman LLP

Date and Time

Tuesday, October 29, 2019

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

*Complimentary breakfast will be served.

Continued

Location

UBS Financial Services Inc.
501 Fellowship Road
3rd Floor
Mount Laurel, NJ 08054

RSVP

Please RSVP no later than Friday, October 25 by contacting:

Jessica C. DeBear
Team Administrator
856.988.4046
jessica.debear@ubs.com

ATTORNEYS MENTIONED

Steven Poulathas