

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.



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