
Business Owner Forum: Monetizing Your Life's Work

February 27, 2020

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 our 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 Jonathan H. Ellis (Shareholder, Flaster Greenberg PC) on the impact of the SECURE Act on retirement and estate planning**

Hosted by: The Atlantic Legacy Group

- **Lulu X. Zappy, CLU, CFA, CFP**
Financial Advisor
- **Douglas M. Pires, CFP**
Senior Vice President
Wealth Management

Speakers

- **Jonathan H. Ellis**
Shareholder
Flaster Greenberg PC
- **Steven S. Poulathas, Esq.**
Chair, Business & Corporate and Taxation
Flaster Greenberg PC
- **Walter J. Szymanski**
Director, M&A
Everingham & Kerr
- **Kristen M. Toler, CPA**
Senior Manager, Tax
Friedman LLP

Continued

Date and Time

Thursday, February 27, 2020

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

*Complimentary breakfast will be served.

Location

Flaster Greenberg PC
1835 Market Street, Suite 1050
Philadelphia, PA 19103

RSVP

Please RSVP no later than Monday, February 24 by contacting:

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Team Administrator

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ATTORNEYS MENTIONED

Jonathan Ellis

Steven Poulathas