

Business Owner Forum: Monetizing Your Life's Work

June 9, 2022

The Atlantic Legacy Group

For our private business owner clients, their life's work is reflected in their enterprise. Whether you are 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

Hosted by:

The Atlantic Legacy Group

Lulu X. Zappy, CFA, CFP®

Vice President

Certified Exit Planning Advisor®

Financial Advisor

Jordan Teichman, CFP®

Vice President

Financial Advisor

Lynn Fryckberg

Senior Vice President

Wealth Advisor

Portfolio Manager

Speakers:

Walter Szymanski

Director, M&A

Everingham & Kerr, Inc.

Kirsten M. Toler, CPA, CGMA

Managing Principal

KMT Consulting, LLC

Continued

Steven S. Poulathas, Esq.

Co-Managing Shareholder, Business & Corporate Taxation
Flaster Greenberg PC

Brad Balmuth, CPA

Partner
Smolin, Lupin & Co., P.A.

Date/Time:

Thursday, June 9, 2022
8:00 - 10:00 a.m. EST

Location:

Flaster Greenberg PC
1810 Chapel Ave W
Cherry Hill, NJ 08002

ATTORNEYS MENTIONED

Steven Poulathas