

Business Owner Webinar Series:

“Maximizing the Value of Your Business Before a Sale”

A Three-Part Series

Following a year like no other, business owners and leaders are wondering how changes in Washington, D.C. may affect the future of their businesses. Ultimately, they want to know, “How can I maximize the value of my business in the current political and economic backdrop?”

Join us for our three-part webinar series discussing the latest views on key considerations regarding tax and planning issues in 2021, and what to do today if an owner is thinking of selling or transitioning their business in the near term.

The program will be led by business advisor professionals focusing on potential impact for CEOs & owners, and discussing key options and strategies when deciding whether now is the right time to explore a sale of your business.

This webinar is ideal for middle market CEOs, business owners and their top management teams, and CFOs of companies with revenues of \$25M or higher.

Participants will walk away with insight on:

- Which tax rules are most likely to change under the new administration and how to plan ahead for any of those potential changes
- Observations on how potential tax reform will affect the amount of proceeds an owner keeps in a sale
- Top planning ideas and opportunities for owners & CEOs to consider implementing in 2021

Part 1: Thursday, April 29th
8:00 a.m. – 9:00 a.m. ET

CHANGES IN TAX LAWS

How tax laws under the new administration may impact the after tax proceeds / what you keep from a merger, acquisition or sale of your business

Pre-register and add to calendar: [click here](#)

Part 2: Thursday, May 20th
8:00 a.m. – 9:00 a.m. ET

PRE-SALE PLANNING

Uncommon success – how to maximize the value of your business pre-sale

Pre-register and add to calendar: [click here](#)

Part 3: Thursday, June 10th
8:00 a.m. – 9:00 a.m. ET

NEGOTIATING THE SALE

How NOT to respond when a prospective buyer offers to buy your business

Pre-register and add to calendar: [click here](#)

- Specific M&A and financial planning strategies for those considering a sale in short or long term
- Suggestions on how to handle an unsolicited offer from a prospective buyer of your business

[Click here](#) for speakers bios

Speakers:

Christopher Reenock, Director
Carter Morse & Goodrich

Michael F. Sweeney, ESQ Founding
Partner and Shareholder Duffy &
Sweeney, Ltd.

Ramsey W. Goodrich, Managing Partner
Carter Morse & Goodrich

Todd Mayo, Senior Wealth Strategist
Advanced Planning Group
UBS Financial Services Inc.

Hosted by:

James Hilton
Private Wealth Advisor, The Hilton
Group
UBS Financial Services Inc.

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