

Thinking of Selling Your Business?



INTRODUCTION TO BUSINESS SUCCESSION PLANNING

- Introduction to getting your business ready to sell
- What do your financials need to look like to be ready?
- Basic Estate Planning and Tax Savings Ideas
- What are the issues of selling a business beyond facts and figures?

Thursday, November 7, 2019

3:30pm - 5:00pm

CAMBRIA GALLERY

42210 Cook Street • Suite M • Palm Desert, CA 92211

Hors d'oeuvres, Beverages & Wine served

PRESENTERS



Kelli Cox, Partner, CPA, CEPA
Certified Exit Planning Advisor
CGC Accountants & Advisors



Jim Bruner, CFP®, CPWA®
UBS Flanagan Bruner Lizza
Wealth Management



Christine C. Weiner, Esq., TEP, CEPA
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GUEST SPEAKER:

Christoph Courth

UBS, Senior Strategist, Family Advisory and Philanthropy Services

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