Manufacturers Resource Center

MRC

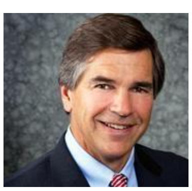
Business Succession Strategies

October 7, 19, 2021 & November 2, 16, 2021 | 8:30 am – 10:00

If you are an owner of a business, the equity that you have built is an essential part of your total net worth and is often the largest single asset. It requires careful planning to successfully navigate the intersection of realizing the business' value, creating a strong, sustainable business succession strategy, and dovetailing both with your personal financial needs. This webinar series will enlighten your understanding of the whole arc of wealth transition from unlocking the value of your business to developing your family legacy.

AGENDA

October 2021	
Thursday: October 7, 2021 **Panel Discussion with the Specialists** 1. **Understanding the dynamics of M&A:** The structures, The process, The deals 2. **Should we sell or should we grow:** Engaging experienced coaches to optimize performance 3. **Middle Management Leveraged Buyouts**: Solutions for owners and opportunities for middle management	**Tuesday, October 19, 2021** **1. Exploring the Utility and flexibility of ESOPs:** Sell all, sell some, sell sooner, sell later **2. ESOPs with 401Ks:** Complementary Qualified Plan Alignment
November 2021	
Tuesday, November 2, 2021 **1. Informing Optimal Succession Strategy** Comprehensive Financial Plans as a critical component of corporate finance **2. Dovetailing liquid investment portfolios and insurance portfolios with personal financial plans**	**Tuesday, November 16, 2021** **1. Preparing Assets for Heirs:** Properly Aligning Trusts and Estate Plans **2. Preparing Heirs for Assets:** Developing personal and family legacy



William G. Stewart III
Executive Vice President Wealth Management
Stewart Jones Wealth Advisory Group
Janney Montgomery Scott, LLC
www.stewartjoneswealthadvisory.com

Bill has over 30 years of experience in the financial industry and is a graduate of The Haverford School and Duke University.

About Janney Montgomery Scott, LLC
They are a full-service financial services firm, providing comprehensive financial advice and service to individual, corporate and institutional investors.

REGISTER NOW

Cost: Complimentary Webinar/No cost
Registration is required at www.mrcpa.org/events

(Virtual Zoom Webinar)
Courtesy of:
Manufacturers Resource Center
7200A Windsor Drive
Allentown, PA 18106
(610) 628-4640