OCTOBER VIRTUAL LUNCHEON PROGRAM

"Business Succession Planning: Lessons Learned from Selling or Transferring a Business"

Tuesday, October 20, 2020

Zoom Webinar

12:30 – 12:45 p.m. Opening Remarks
12:45 –1:45 p.m. Webinar Presentation

Successfully selling a business or transferring it to family members can be extremely challenging, especially when the owner is also focused on the day-to-day activities of running and growing the business. Each sale or transfer situation is unique, reflecting the diversity of business owners and enterprises. One theme recurs, however: the magnitude of this transition. Selling or transferring a business has critical ramifications for the owner, the owner's family, employees, and community. Because experience can often be the best teacher, this session highlights the experiences of several business owners who have tackled this critical transition. Gain insights and strategies that address the challenges business owners may face when deciding what the next step is for their business. Mr. Drossman will draw insights from his work with closely-held family businesses and from stories featured in "The Owner's Journey," a whitepaper prepared by the Eugene Lang Entrepreneurship Center at Columbia Business School, in collaboration with U.S. Trust, Bank of America.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:
Mitchell A. Drossman is Managing Director and Head of National Wealth Strategies for the Chief Investment Office (CIO) within Bank of America's Global Wealth & Investment Management (GWIM) division. In this role, Mitchell manages and leads the Wealth Strategies Advisors to provide objective insight to help U.S. Trust, Bank of America Private Wealth Management clients align their financial and estate planning strategies with their goals by integrating the full capabilities of our investment and financial planning services and by utilizing the broad range of Bank of America Corporation and its affiliates. Mitchell works with individuals, families, closely-held family businesses, family offices and institutions in conjunction with their tax and legal advisors to facilitate wealth transfer, business succession (pre-and post-liquidity event strategies), wealth structuring and estate planning needs that are often complex requiring customized analysis and strategies.

Zoom Log-In Information
Log-in information will be sent to all registered attendees the day prior to the program.

We have reviewed several video communications services and have chosen Zoom for this event. Unfortunately, not all firms permit the use of Zoom so if you are prevented from using it to attend this event due to company restrictions, please join us using a personal computer or cellular phone or by simply dialing in and listening to the event from a telephone. If you will be using a personal device, please test your connection early; an app or registration may be needed the first time Zoom is used.

Philadelphia Estate Planning Council ● P.O. Box 579 ● Moorestown, NJ 08057 ● 215-486-6215
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October 20, 2020 VIRTUAL LUNCHEON PROGRAM
Registration Form

As a special member benefit during the pandemic, current PEPC members will receive complimentary registration to our October 20th virtual luncheon program.
Continuing education credits not included.

Luncheon Program Fee:

PEPC Members	$0	Non-Members	$25

Additional Fees:

CLE Credit (Members)	$15	CLE Credit (Non-Members)	$15
Insurance Credit (Members)	$15	Insurance Credit (Non-Members)	$15
CFP® Credit (Members)	$15	CFP® Credit (Non-Members)	$15

No-shows will be billed. No refunds after October 16, 2020.

ATTENDEE INFORMATION:

Name: ______________________________ Discipline: ____________________

Company: ____

Address: ____

City, State, Zip: _______________________________________

Phone: ________________________ Email: ________________________

CONTINUING EDUCATION INFORMATION:

(Fee: $15 per Credit)

- ☐ Continuing Legal Education (1 credit)…………………Attorney ID: ____________________
- ☐ Insurance Continuing Education (1 credit)…………License Number: ____________________
- ☐ CFP® Continuing Education (1 credit)………………..Last 4 Digits of SSN: ____________________

CTFA, PACE and CPA Certificates will be emailed to attendees after the webinar at no additional charge.

PAYMENT INFORMATION:

- ☐ Check Payment (Payable to PEPC)
- ☐ Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215
(Registrations will not be accepted via phone)