



BUSINESS EXIT STRATEGIES

FOR YOU AND YOUR BUSINESS

An informational workshop focused on enhancing the value of your business and positioning it for a future sale or transfer.

Thursday, October 13th, 2016
11:30 am - 1:30 pm

Old Ranch Country Club
3901 Lampson Ave
Seal Beach, CA 90740

Lunch will be served

Call to reserve your seat today
Space is limited!

RSVP to Larissa Lucero by 10/06/16

Via phone (949) 223-8226

Via email Larissa.lucero@tfgroup.com

SPONSORED BY:

Cathy Fitzpatrick
Proud RCA Member



Presented By:



Sean McCloskey
Tax & Financial Group



Cathy Fitzpatrick, CFP®, CLTC®
Financial Strategist and RCA Member

Topics will include:

- How do I help ensure I can retire or exit my business when I want to?
- Do I need a strategy to exit my business?
- What can I do in the short run and long run to help maximize the value of my business and increase the likelihood of a successful exit?
- Who's going to buy me out of my business and how?
- What happens to my business upon the death, disability, or retirement of a partner?



Intrafamily Transfer



Sale to Employees



Sale to Third Party

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