



Exit
Planning
Institute™

Greater Los Angeles & Orange County Chapters

OWNER'S ROUNDTABLE 2019

May 21, 2019
7:00am - 12:30pm



Please join us for our **3rd Annual Owner's Roundtable**, a **half-day**, value-packed **workshop** designed for business owners who want to **maximize the value of their businesses** and exit on their terms.

Owner's will walk away with:

- Personalized business score and marketability report;
- Self-identified action items to immediately begin improving your business value; and
- Invaluable connections with like-minded professionals and business experts

Find Out the
Top 5 Mistakes
Most Business Owners Make!



*"If you are not ready to sell
your business, you are
not ready to grow it."*

- Chris Snider
CEO and President, Exit Planning Institute

This event is brought you by the Greater Los Angeles EPI Chapter, Orange County EPI Chapter, and the City of Torrance. For questions, call Melisa Silverman at (818) 758-8457.

Register at: www.scinstitute.org/OR2019

 May 21, 2019

 7:00 am – 12:30 pm

 **Torrance Cultural Arts Center**
Toyota Meeting Hall
3330 Civic Center Drive
Torrance, CA 90503

 Buffet Breakfast, parking
included in the costs

 \$99/attendee

Sponsorship Opportunities

If you are interested in a Corporate or Advisor sponsorship,
please email **Kevin Sierzant at Kevin.Sierzant@bnymellon.com**

4 Unique 30-Minute Panel Talks, Then 15-Minutes of Discovery

Expert Speaker Announcements Coming Soon - Check www.scinstitute.org/OR2019 for updates

7:00 – 7:45 | Networking, Hot Breakfast, and Introductions

7:45 – 8:30 | #1: Assess Your Business Value, Attractiveness, and Readiness

Learn, Evaluate, and Discuss:

- Your business score and marketability report (and how to use it);
- Using business/personal assessments to spot opportunities, gaps and issues;
- What is and is not important;
- How all your assets contribute to planning for exiting the business and your overall financial future; and
- Tools that can identify your exposure to business and personal risks.



have NO planning at all

8:35 – 9:20 | #2: Assess Your Personal and Family Readiness

Learn, Evaluate, and Discuss:

- How to identify and align company vision/strategies for owner and key leadership team;
- How to chart the path for successfully defining and achieving your family's desires and aspirations;
- Key personal planning and business improvements that increase enterprise value; and
- What life looks like for you and your family post-sale.



have NO written transition plan

9:25 – 9:40 | Networking Break

9:40 – 10:25 | #3: Assess Opportunities to Build Your Business Value

Learn, Evaluate, and Discuss:

- How to implement business initiatives that build value, grow your business, and cause better marketability; and
- Tools to facilitate the transfer planning process such as: audited financials and pro forma projections; benchmark valuation for comparison to the baseline valuation; legal review of contracts, corporate documents, IP, etc.; preparation for the business and legal due diligence phase; and estate, tax and charitable planning options.

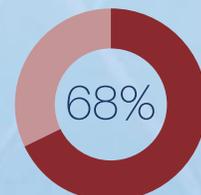


have NO transition team in place

10:30 – 11:15 | #4: Assess Your Business Exit Options

Learn, Evaluate, and Discuss:

- Pros and cons of 10 internal & external exit strategies;
- How to create and implement your business transition plan; and
- Dealing with obstacles and hurdles that can derail the transition of your business.



intend to transition within 10 years

11:20 – 11:35 | Networking Break

11:40 – 12:15 | Discussion with Business Owners in Various Stages of Exit

This will be a facilitated and spirited discussion with business owners going through such things as considering an exit, transitioning to family and/or key team members, experiencing the loss of a love one, executing an ESOP that went south and recovered, and changing their mind during the transition process. Get an invaluable glimpse into what business owners think and feel, and the help they really need with both preparing the business for business succession, and preparing themselves for life post transition.

12:15 – 12:30 | Take Aways