



SAVE THE DATE

Converting Business Value to Family Wealth
*Maximize Your Business Value and Transfer
that Value to Your Stakeholders and Family*





BNY MELLON
WEALTH MANAGEMENT



Whether you are thinking about selling your business in six months or six years, owners receive the best offers when they are prepared, governance is sound, processes are optimized, and strategic assets are in place. Optimizing a business sale for the owner, including the owner's family, requires intelligent planning, decisions and implementation that best occurs over a long period preceding the transaction.

BNY Mellon Wealth Management and Gates and Company invite you and your colleagues to hear from our corporate growth, M&A, and wealth management leaders as they discuss how to build value, prepare for a future transaction, and put plans in place to preserve wealth.

This session will address a range of topics, including:

- Evolving value drivers and "strategic assets"
- Positioning to maximize business value
- M&A sales process overview
- Deal success factors
- Determining post-sale lifestyle and legacy goals to estimate target sale price
- Unique once-in-a-lifetime family and charitable pre-sale wealth transfer opportunities to reduce taxes and advance legacy goals
- Planning for transition from business owner family to financial family

WEDNESDAY, SEPTEMBER 20, 2017

7:30 AM - 10:00 AM

Wilmington Country Club

GUEST SPEAKERS

David Gates
President and Managing Director
Gates and Company

Marty Babitz
Wealth Strategist
BNY Mellon Wealth Management

If you have a friend, colleague or client for whom this topic would be appropriate please feel free to register them too.