



BUSINESS OWNER Summit

Weingard
WEALTH
MANAGEMENT of
RAYMOND JAMES[®]

DAY PITNEY LLP

WEDNESDAY, JUNE 8, 2022

AGENDA

12:00 p.m. – 12:30 p.m. – Lunch and Registration

12:30 p.m. – 12:40 p.m. – Introductory Remarks

Aron Weingard, Financial Advisor at Weingard Wealth Management of Raymond James

R. Scott Beach, Partner and Chair of Corporate Department at Day Pitney LLP

12:40 p.m. – 1:40 p.m. – Accessing and Managing the Internal Soundtrack as you Navigate the Business Owner's Journey

A facilitated discussion as you chart your course towards purpose and fulfillment

Sunil Arora, Professional Coach for Individuals and Companies at Arora

1:40 p.m. – 2:00 p.m. – Roadmap & Timetable to Positioning a Company for Exit

What you need to make sure you are addressing at what points in the process

R. Scott Beach

2:00 p.m. – 2:10 p.m. – Break



2:10 p.m. – 2:50 p.m. – Life Leading Up to the Sale – Lessons Learned

Building the Business, Communicating with and Retaining Employees & Personal Planning

Wiley Cerilli, Co-Founder of SinglePlatform, Good Uncle and HouseAccount; EVP of Seamless; Venture Partner at First Round Capital

2:50 p.m. – 3:40 p.m. – Panel: Valuing the Business, Positioning the Business for Sale & Determining Investments to Grow Value

Andy Stockett, Managing Director at FourBridges Capital Advisors

Scott Macintosh, Co-CEO and Co-Founder at Valterra Partners

Ken Grider, Managing Director and Head of Investment Banking Business Development at Raymond James

Steven Loffman, Managing Director at Raymond James Real Estate Investment Banking

3:40 p.m. – 3:50 p.m. – Break

3:50 p.m. – 4:25 p.m. – Life After Sale

Expectation that you still be involved, dynamics of having a new role and finding meaning after leaving the company

Scott Heiferman, Founder of MeetUp, Fotolog & I-traffic; 2017 MIT Innovator of the Year

4:25 p.m. – 5:00 p.m. – Charitable Giving

How to take thoughtful action effectively, strategically and on time

Mark Gerson, Co-Founder & Chairman of African Mission Healthcare and United Hatzalah of Israel; Co-Founder of Gerson Lehrman Group, Interesting Investment Institute, and several other companies

5:00 p.m. – 5:20 p.m. – Aligning Your Personal, Business & Financial Plans to Live Your Dream Life

How to mitigate taxes and maximize the financial results from selling your business

Aron Weingard

5:20 p.m. – 5:25 p.m. – Wrap Up

5:30 p.m. – Cocktail Reception

Pebble Bar - pebblebarnyc.com

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