

WANT TO TRANSITION YOUR BUSINESS? THE RULES HAVE CHANGED!

Learn What You Need to Know and Do
To Exit Your Company On Your Own Terms
in Today's Economy

Keynote Speaker

Rick Taft, Business Transfer Alliance



Presenting Sponsor
Reid and Riege, PC

Event Sponsors
HT Capital Advisors LLC

**Sagemark Consulting
Private Wealth Services**

TD Bank

Breakout Session 1: Planning Process

Russ Lowry, Sagemark Consulting Private Wealth Services;
Greg Barringer, Reid and Riege, PC; **Jim Jackson**, The Essex Group;
Bruce Clinton, ASearch, LLC

- Wealth Management, Trust & Estate Law, HR & Succession Planning
- Setting specific Business and Personal Goals
- Changing Your Role in the Company
- Concerns of Management Team & Employees
- Transferring Your Business Within The Family

**Repeat Breakout
Sessions with
7 Experts on
Executing
Successful Business
Transitions**

Tuesday, May 5

7:30 -10:30am

**New Haven
Lawn Club**

193 Whitney Avenue
New Haven

\$25 GNHCC Members
\$40 Public

Breakfast included.

**Online registration
available at
www.gnhcc.com**

Breakout Session 2: Legal and Financial Issues

Bill Creaser, TDBank; **Eric Lomas**, HT Capital; **Scott Junkin**, Reid and Riege, PC

- Investment Banking, Traditional Financing; Business & Corporate Law
- Legal Aspects You Need to Consider
- Role and Value of an M&A Advisory Firm
- Recent Case Studies

Name _____ Phone _____
Company _____
Guests _____
Amount Enclosed \$ _____ Check / Charge: Visa MasterCard AmEx
Account # _____ Exp _____
Signature _____

Mail, fax or email to: Greater New Haven Chamber of Commerce, 900 Chapel Street, 10th floor,
New Haven, CT 06510 / Fax: (203) 782-4329 / **Email:** ptommaselli@gnhcc.com
Call: Paul Tommaselli (203) 782-4342