

Exiting Your Business Successfully: What You Need To Know

6 Experts Give Their Advice Regarding Business Ownership Transitioning

Monday, November 7, 2011

HarborOne U
131 Copeland Drive
Mansfield, MA 02048-1249

7:45 AM Registration and complimentary breakfast

8:00 AM to 10 AM Presentation (speakers are available after the presentation for questions)

To register for this event, please visit: <http://exit110711.eventbrite.com>.

For questions, please email Frank Mancieri at fmancieri@b2bcfo.com or call Frank at 401-651-1585

If you are like most business owners, you have devoted an immeasurable amount of work and resources into growing your company. With all that you have invested, doesn't it make sense to plan an exit from that business that protects the wealth you have accumulated in it? After all, exiting your business will certainly be one of the most important financial events of your life. The first step is to understand that an exit is not simply the sale of your business. Rather, it is a process that may occur over many years and selling your business is just one of many options available to you. Designing your exit strategy will take time, planning, and forethought but will allow you to reap the greatest reward for your years of hard work.

What is an Exit Plan?

An exit plan outlines your options as a business owner for transition of your business in the most wealth-protective way. This plan takes into account all factors related to your personal life, your business, the timing you would like for the exit, as well as potential successors or buyers.

Free Executive Briefing for Business Owners

Agenda

- The landscape for exit planning and the exit planning process – **Frank Mancieri, B2B CFO®**
- Goal setting and determining your financial readiness – **Peter Lounsbury, LPL Financial**
- Determining your mental readiness – **Norman Gauthier, Heritage Hill Partners**
- Understand all your options – **Jonathan Pike, Sharkansky, LLP**
- Understand the value of the options you choose – **Pamela Oliver Stephenson, Horizon Valuations, LLP**
- Legal aspects of exit planning and execution – **Marc Clerc, Clerc & Associates, P.C.**
- Closing: Executing your exit strategy plan – **Frank Mancieri, B2B CFO®**

SPEAKERS



Frank Mancieri, MBA has been working with clients on exit strategies and exit planning since 2001. He is a professional Chief Financial Officer and Business Exit Consultant. Frank is a Partner at B2B CFO®, USA's largest CFO

firm focusing on mid-market companies. He serves owners of emerging and mid-market companies with revenues up to \$75 million who want to increase cash, profitability, sales and company value. He is also an adjunct Accounting Professor at Rhode Island College.

Frank graduated from Bryant University with both a Bachelor of Science (B.S.) Degree and a Master of Business Administration (MBA) degree.



Pete Lounsbury has been a licensed Financial Services professional since 1993 and establishing his own practice in 2001. He established his financial planning practice in order to be able to provide his clients with a high level of

service, guidance and perhaps most importantly, unbiased advice. Being a small business owner himself, Pete is fully aware of the needs and challenges business owners face on a daily basis. It is his goal to provide business owners with the necessary support and guidance to allow them to make the best decisions for them and their company. By working closely with business owners and truly listening to their needs he strives to be a valuable part of their support team and assist them in realizing their future success.



Norm Gauthier is the Managing Partner of Heritage Hill Partners, a business coaching & consulting company that works with individuals and organizations that are committed to improving performance and bottom line

results. He is an affiliate of Resource Associates Corporation and public speaker with national and global industry experience in human resource management, organizational development, executive coaching, and process improvement. A sample of his diverse industry knowledge and experience includes information technologies, financial services, manufacturing, family owned business and, non-profits.



Jay Pike joined Sharkansky in 1998 and is grateful for the opportunity to work directly with local privately-owned businesses,

focusing on matters of critical importance to each client. Since starting his career in public accounting in 1992, Jay has embraced the objective of helping each client attain a higher profitability level, by applying analytical techniques and carefully identifying and implementing tax planning strategies.



Pamela Oliver Stephenson is the Principal of Horizon Business Valuations LLC. Horizon Business Valuations LLC provides business valuations, investigative accounting, and litigation support services. Ms. Stephenson provides business valuation services of closely-held businesses for the purpose or marital

dissolution, business and stockholder disputes, capital reorganization, estate and gift tax planning, purchase and sales, buy-sell agreements, and business planning. Additionally, she provides litigation support services regarding the determination of business damages, matrimonial litigation services, forensic and investigative accounting. Ms. Stephenson has earned the designations of CPA, ABV, CDFA, and CFFA.



Marc Clerc is the founding partner of Clerc & Associates, P.C., a firm specializing in the legal needs of the small business owner. As the owner of a small business himself, Attorney Clerc understands the specific and focused needs of the small business owner, and has built his law

practice on the principle of offering prompt access along with responsive, seasoned legal advice. Marc provides timely, practical and cost-effective strategies to address the needs of the business owner in areas including the purchase and sale of businesses, choice of entity decisions, commercial leases, partnership agreements, and general contracts. Marc founded Clerc and Associates in 1998; he holds a Bachelor of Science Degree from Boston College and a Juris Doctor from the New England School of Law.