

Please join us

Business transition seminar with
special guest Caleb Porter,*
Portland Timbers Head Coach.

Wednesday, May 7, 2014



Someday you will transfer your business to new owners. The resulting transition may be the single largest financial transaction of your life.

Now is the time to start planning for it.

Join us for an educational and memorable evening at the KeyBank Club at Providence Park to learn more about planning a successful transition. Our experienced panel of professional advisers will present information on:

- The importance of transition planning
- Tax planning strategies to improve net sale proceeds
- Addressing legal issues to enhance value prior to sale
- Strategies for maximizing business value
- Advantages private equity firms provide during transitions
- How ESOPs/SBA loans help the transitions to employees or family

Panelists

Michael Lortz, CPA, LEED AP, Shareholder, Geffen Meshner

Jeff Cronn, Partner, Tonkon Torp

Mike Grubb, Partner, ASG Partners

Jose Blanco, Ph.D., Principal, CVF Capital Partners

Jennifer Prouser, Vice President, SBA Specialist, KeyBank

KeyBank Club at Providence Park

1844 SW Morrison

Portland, OR 97205

Enter at the Team Store gate on 18th Avenue

Wednesday, May 7, 2014

3:00 p.m. Registration

3:30 p.m. Caleb Porter, Portland Timbers Head Coach

4:00 p.m. Panel Presentation

6:00 p.m. Cocktails, appetizers, and networking

RSVP by Friday, April 24, 2014

Call Sarah Fast at 503-626-1563 or sarah_m_fast@keybank.com.



*Subject to change.

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