

# Equity to Liquidity to Legacy

How to Execute a Profitable Exit Strategy and Preserve Your Legacy for Generations to Come

Presented by:  
SARASOTA PRIVATE TRUST COMPANY

**69%** of privately held business owners plan to exit their business in the Next 10 Years, however, very few actually have a plan to do so.

*Business Enterprise Institute*

## *A Conference For The Strategic Business Owner*

A business is often the most valuable asset for a family, but frequently there are gaps in the business owner's exit plan that could create a future financial loss if not corrected. Proactive planning ensures that a business is well positioned to attract an investor upon exit and that the owner can enjoy a successful sale that creates significant family wealth.

By understanding the Master Exit Planning process and Family Transition Planning, business owners will have greater control as they execute their plan, realize the maximum return on investment upon exit and ensure the wealth created is protected for generations to come.

### THIS Conference:

**Explains** the primary exit strategies and the necessary components of a Master Exit Plan and the necessary strategies to prepare and engage a family to create a long-term legacy.

**Educates** attendees on the most impactful value drivers and how to effectively increase their return on investment upon exit as well as the reasons most families fail at preserving family and wealth and what families are doing to reverse the trend.

**Presents** the professional mergers and acquisitions process used to sell a business, including understanding value, buyers, deal structure and minimizing tax impact and The GenLeg seven step process to healthy family governance and legacy.

**Delivers** a strategy to protect a family's wealth through proper family transition planning and how to invest in the family to create a legacy plan.

**Discusses** the impact of timing in the mergers and acquisition marketplace on selling price.

[REGISTER HERE](#)

## Details



Thursday - January 18, 2023

8:00 a.m. – Breakfast

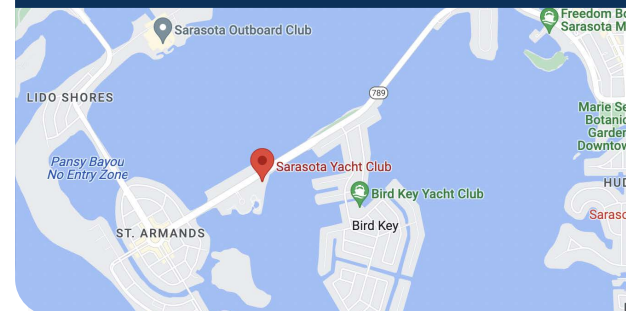
8:30 a.m. to 12:00 p.m. – Conference



Sarasota Yacht Club

1100 John Ringling Blvd.

Sarasota, FL 34236



## Speakers



**Chris Vanderzyden,**  
CPA, CVGA

Founding principal of  
Legacy Partners, LLP

Author of Master Your Exit  
Plan: Sell Your Business,  
Preserve Your Legacy



**Tom Rogerson**

Founding principal  
of GenLegCo.