

YOU ARE CORDIALLY INVITED
TO THE
FREEDOM BREAKFAST SEMINAR
FOR BUSINESS OWNERS:
Maximize Your Outcome Now & In the Future

WEDNESDAY, NOVEMBER 9, 2016

7:15 A.M. TO 9:00 A.M

Event Location: Allen & Company
1401 Florida Ave S. Bldg. 1419 Lakeland, FL 33803

- BY INVITATION ONLY-

SEATING LIMITED

PLEASE RSVP BEFORE OCTOBER 18

By responding to this email

FREEDOM SEMINAR FOR BUSINESS OWNERS

Is your life balanced? Are you prepared for any eventualities? Most business owners aren't. Unlocking the value of your Business, planning for your future and the future of your family, and having the tools to take the best decisions at any time, do not just happen on their own. This seminar will provide the key elements to achieve the optimal outcome, no matter what life throws at you.

Seminar Schedule:

7:15 Registration and Hot Breakfast Buffet

7:30 Seminar will start promptly

9:00 End of Seminar

Some of the topics:

- Learn about the 8 drivers of a business and how they impact value
- Use the financial information to optimize your Business, not just taxes
- Talk to a Banker to improve cash flow, expand, or buy a property & assets
- Know the SBA requirements—how to make sure your business qualifies when you sell
- Get the maximum after-tax net proceeds at time of sale - Transaction structuring
- Choose your future. Know the value of your business and what it means for tomorrow
- Plan your next Act, progressively increase your freedom, in order to enjoy life
- Be always ready – documents and planning tools all business owners should have
- Manage your Wealth - a new perspective for business owners
- Find out why businesses sell or do not sell
- Discover how the value of a business is determined

PRESENTING SPONSORS



Celine Dufresne is the owner of Quantum Leap Business Growth. She is a Certified Global Management Accountant, Certified Merger & Acquisition specialist, Broker, and Certified Value Builder among other qualifications. She owned multiple successful businesses from construction, to manufacturing, to services. She has worked as a manufacturing consultant, specialized in improving efficiency and profitability, has been involved in turnarounds, exit strategy, partner buy-outs, and of course, the sale of Businesses.



Scott Gardner, VP/Commercial Banking joined Bank of Central Florida in 2011, and supported the Commercial Lending and Credit Administration teams since that time. Mr. Gardner's banking career began at World Omni Financial Corporation in Fort Lauderdale in 1993, and continued with First Union in Charlotte, NC in 1996. He returned to his hometown of Lakeland in 2003 as a commercial banker with SunTrust, and later with MIDFLORIDA Credit Union. Mr. Gardner graduated from the University of Florida with a double major in Finance and Marketing.



Tracy Y. Kimbrough, CPA CFST manages the Firm's Audit and Assurance Services and has worked with the firm since 1988. She has participated in financial and compliance audit engagements for a wide variety of organizations. Her responsibilities include completing and reviewing income tax returns of corporations, S corporations, partnerships and individuals, pension plan administration, and not-for-profit organizations. Tracy has supervised and coordinated Small Business Services activities.



Kevin R. Albaum earned his bachelor's degree at Florida State University where he competed for FSU's mock trial team across the country. Immediately upon graduation, he enrolled at Stetson University's College of Law in Gulfport, Florida due to their specialty program in elder law and his passion for that specific field of the law. Kevin moved to Lakeland, Florida to join Clark, Campbell, Lancaster, and Munson where he practices in the areas of: elder law, guardianship, estate planning, trust administration, and Medicaid.



Brad Stainsby earned his Bachelor's degree in Business from Florida Southern College in 2003. Brad is a teacher at the core and desires to help his clients understand, develop, and achieve their investment goals. Brad holds the Series 7 and 66 licenses as well as Life, Health and Variable Annuities..



Celine Dufresne is also the President of Florida Business Transfer Specialists, Inc., D/B/A Murphy Business & Financial Services. As a Certified Business Intermediary, she has been involved with hundreds of Business transactions during the last 16 years in Florida. Murphy Business also specializes in Business Valuations, Equipment Appraisals, and Real estate sales (when combined with a Business).

DIRECTIONS

1401 Florida Ave S. Bldg. 1419 Lakeland, FL 33803
(863) 688-9000

Building 1419 is Allen & Company's conference/seminar room and is in the same parking lot as the main building.

Please park to the left of Allen & Company's main building, closest to building 1419.

