

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

TUESDAY, OCTOBER 25, 2016
7:15 A.M. TO 9:00 A.M

6151 Lake Osprey Dr. 3rd Floor Conference Room
Sarasota, FL 34240

- BY INVITATION ONLY-
SEATING LIMITED

PLEASE RSVP
By responding to this email

FREEDOM SEMINAR FOR BUSINESS OWNERS

Is your life balanced? Are you prepared for any eventualities? Most business owners don'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 throw 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 qualify 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 multiples 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 turnaround, exit strategy, partner buy-out, and of course, the sale of Businesses.



Mark Stryczny is a Business Relationship Manager for Chase, serving the banking needs of business owners. He has extensive experience in Business Banking, winning awards such as 2014 Business Banking National Achiever, as well as Relationship Manager of the Month multiple times. His clients see him as a business banker who gets things done via both Conventional and SBA loans as well as attending to their cash management and daily banking needs.



KOONTZ & ASSOCIATES, PL
Real Estate, Business, and Tax Lawyers

JoAnn M. Koontz is an attorney and CPA practicing in the areas of business organizations, and taxation. She represents clients in a wide variety of business and real estate matters, S corporation, partnership and LLC formation and reorganizations. She advises her clients on tax implications of business and real estate transactions, including purchases and sales of assets and equity interests.

Kate Smith Law Group
Wills, Trusts & Estates and Business Planning

Kate Smith, Attorney at Law graduated from the University of Wisconsin School of Law, where she obtained her law degree. She then graduated from the University of Missouri School of Law, where she obtained her Masters of Tax Law (LL.M. in Taxation). She has been licensed to practice law in Florida since 2000, and has 18 years of experience in Estate Planning, Probate and Business Planning.

MARIASH LOWTHER Wealth Management



Merrill Lynch
Wealth Management

Bank of America Corporation

Isabelle Striplin, Financial Advisor

has been a part of the financial services industry since 1990 and joined Merrill Lynch in 2015. She has dedicated herself to thoroughly understanding the priorities of high-net-worth individuals and families, providing them with personalized attention and disciplined, customized investment strategies that complement her ability to pursue the financial lifestyle that is most meaningful to her clients.



Celine Dufresne is also the President of Florida Business Transfer Specialists, Inc, D/B/A Murphy Business and 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 Valuation, Equipment Appraisal, and Real estate sales when combined with a Business.

DIRECTIONS

6151 Lake Osprey Drive, 3rd Floor, Sarasota, FL 34240
941.302.2857

From I-75:

Take exit 213

And drive east on University Pkwy

Turn right on Lake Osprey Drive

When you pass Holiday Inn, turn left in to the parking lot,

Look for **Executive Suites @ Lakewood Ranch**

Parking and entrance are by the lakeside

Take the elevator to the 3rd floor

The conference room is by the elevators

