

YOU ARE CORDIALLY INVITED TO

Before, During and After the Exit

“Exiting your business” — a special event for business owners

HOSTED BY

Jose Tavarez
Managing Director, Division Executive
Bank of America Private Bank

FEATURING

Jack Crilly
Managing Director, Wealth Strategy Market Director
Bank of America Private Bank

Jonathan Leonard
President
Mercury Notifications

Daniel Casper
Managing Director, Wealth Strategies Advisor
Bank of America Private Bank

Brendan Hanley
Co-Head, Emerging Growth & Regional Coverage
Bank of America Investment Bank

THURSDAY, OCTOBER 29

4:00 p.m. – 5:00 p.m.

RSVP

[Click here](#) to register by October 27, 2020.

ABOUT THE EVENT

Your business has always been a big part of you. How would you even begin the process of exiting? What does the next chapter of your life look like? Join Bank of America Private Bank for “Before, During and After the Exit” - a special event for business owners. At this informative event, we’ll explore the unique challenges you may face as you consider selling or transferring your business.

Our panelists will discuss:

- Creating a plan that integrates your personal, family and company goals
- The most common exit strategies
- Challenges/lessons learned by going through the process
- What to consider when structuring a sale
- Current state of the M&A environment
- Ideas for your next chapter after you exit

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