

The Road to Selling Your Business

PROGRAM OUTLINE & AGENDA

PROGRAM

How to Maximize the Sales Value of your Business – by negotiating the best sales transaction and optimizing the value of the proceeds for your family and for future generations.

WHO SHOULD ATTEND

Business owners who are considering a sales transaction – and those who want to plan ahead for a future transaction, or members of their trusted team.

AGENDA

8:00 AM - Registration and complimentary hot breakfast

8:30 AM – Introduction by Rob Kerr

8:45 AM – Howard Johnson – ***Selling Your Private Company – 8 Steps to Value Realization*** – This presentation will provide an overview of the steps involved in selling a private company – from pre-sale planning to identifying the right buyers, negotiating the transaction and closing. It will highlight the key elements of each stage and common pitfalls to avoid.

9:15 AM - Krista Kerr – ***How to Transition from Managing your Business to Managing your Family Financial Capital*** – This presentation will focus on how to replace the income from your business after the sale, financial planning strategies to optimize your resources and manage risk and best practices around family governance to ensure the sale of the business is positive for yourself and future generations.

9:45 AM – Q&A

COST

Complimentary, by invitation.

TAKE AWAYS

Kerr Financial booklets: “40 Tax Tips”, “40 Financial Planning Tips” and “40 Investment Tips”.



Integrated Wealth Management and Family Office Services

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