

Exit Options for Business Owners

Which path is right for me, my family, and my business?

Overview

As a business owner, how do you know if you are ready for an exit? The first step is learning about the process of transitioning a business and identifying the exit option(s) that best align your personal, financial, and business goals. Come join Eric Worrell, a Certified Exit Planning Advisor and Certified Financial Planning Professional, for an educational presentation that explores exit readiness and exit options for business owners. During our time together, Eric will discuss the following:

Key Topics

- How to prepare yourself, your family, and your business for an exit.
- How to determine business valuation.
- How to calculate an owner's wealth gap.
- Pros and Cons of internal exit options, such as: intergenerational transfers, management buyout, and ESOP.
- Pros and Cons of external exit options, such as: sale to a third party, recapitalization, and orderly liquidation.

Presenter

Eric Worrell, Managing Director, Investment Officer, PIM
Wells Fargo Advisors



When

Wednesday, September 11, 2024

11:30 am – 1:30 pm

includes boxed lunch for in-seat participants

In-Seat or Virtual

- In-seat participation offered at the AGC Georgia Training Center
1940 The Exchange; Atlanta, GA
at Windy Hill Road and I-75 / I-285 in Cobb County
- Virtual participation in the live session will be via Zoom. The link will be emailed to virtual registrants the day before the session.

Registration Fee

- AGC Georgia Member \$25
- AGC Georgia YLP Member \$20
- Non-AGC Georgia Member \$50

Attendee Registration Form *(you may also register at www.agcga.org)*

☐ In-person or ☐ Virtual via Zoom Name: _____ Title: _____

Registrant's Email: _____ Phone: _____

Company: _____ Street Address: _____

City: _____ State: _____ Zip: _____ Food Restrictions (if in-person): _____

Primary contact for registration, if not registrant: _____ e-mail: _____

Check One:

- ☐ Check: Make checks payable to AGC Georgia. Mail copy of this form with your check to our lockbox:

Wells Fargo Bank/ AGC Georgia; P. O. Box 934023; Atlanta, GA 31193-4023

- ☐ Charge My: ☐ AmEx ☐ MC ☐ Visa ☐ Discover Total Amount Due \$ _____

Name on Card: _____ Card # _____ Exp. _____

Regardless of payment method, please use one of the methods below to return this form:

- Electronically: Use "Click to Submit" button to attach to an automated email (*Doesn't work on all systems*)
- Fax: 678-298-4101
- Email: After completing form scan to registration@agcga.org.

Cancellation Policy: The registration fee is fully refundable up to one week prior to the session. If you do not cancel before this one-week period or do not attend the session, the registration fee will not be refunded. Substitutions are encouraged and may be made by emailing parham@agcga.org. Confirmation to registered participants will be provided prior to the event via email.