

# WANT TO TRANSITION YOUR BUSINESS? THE RULES HAVE CHANGED!

Learn What You Need to Know and Do  
To Exit Your Company On Your Own Terms  
in Today's Economy

Keynote Speaker

**Rick Taft**, Business Transfer Alliance



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**HT Capital Advisors LLC**

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## Breakout Session 1: Planning Process

**Russ Lowry**, Sagemark Consulting Private Wealth Services;  
**Greg Barringer**, Reid and Riege, PC; **Jim Jackson**, The Essex Group;  
**Bruce Clinton**, ASearch, LLC

- Wealth Management, Trust & Estate Law, HR & Succession Planning
- Setting specific Business and Personal Goals
- Changing Your Role in the Company
- Concerns of Management Team & Employees
- Transferring Your Business Within The Family

**Repeat Breakout  
Sessions with  
7 Experts on  
Executing  
Successful Business  
Transitions**

**Tuesday, May 5**

**7:30 -10:30am**

**New Haven  
Lawn Club**

193 Whitney Avenue  
New Haven

\$25 GNHCC Members  
\$40 Public

Breakfast included.

**Online registration  
available at  
[www.gnhcc.com](http://www.gnhcc.com)**

## Breakout Session 2: Legal and Financial Issues

**Bill Creaser**, TDBank; **Eric Lomas**, HT Capital; **Scott Junkin**, Reid and Riege, PC

- Investment Banking, Traditional Financing; Business & Corporate Law
- Legal Aspects You Need to Consider
- Role and Value of an M&A Advisory Firm
- Recent Case Studies

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Company \_\_\_\_\_  
Guests \_\_\_\_\_  
Amount Enclosed \$ \_\_\_\_\_  Check / Charge:  Visa  MasterCard  AmEx  
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**Mail, fax or email to:** Greater New Haven Chamber of Commerce, 900 Chapel Street, 10th floor,  
New Haven, CT 06510 / Fax: (203) 782-4329 / **Email:** ptommaselli@gnhcc.com  
**Call:** Paul Tommaselli (203) 782-4342