



Graystone Consulting & Maryland AGC
Present a Three Part Speaker Series:
Developing a Business Exit Strategy



Wednesday March 3, 2010
11:30 a.m. - 1:30 p.m.

Identify & Prioritize Transition Goals

The Engineers Club
11 West Mount Vernon Place
410-539-6914
www.esb.org

Economic cycles create peaks and valleys of opportunity. Be prepared to take advantage of an improving business environment to plan your future by identifying your transition goals.

- Maximize Value of Business
- Risk Management Planning
- Family Wealth Creation/Continuation/Legacy
- Retirement Considerations
- Minimize Taxes
- Maximize Probability of Success
- Reduce Stress of Transition
- Estate Planning Needs

Scheduled Speakers

Graystone Consulting

James K. Meek, CIMA - Director Wealth Management

Russell M. Lagreca, CFP,CRPS - Financial Advisor

Morgan Stanley Smith Barney

Matt Del La O, Director Mergers & Acquisitions

Offit Kurman

Maurice Offit, Principal, Estate Planning

The Graham Company

Christopher Keith, Risk Management Consultant

Schedule

11:30 am - Noon	Registration
12:00 - 12:15pm	Opening Remarks, Lunch Served
12:15 pm - 1:00 pm	Panel Discussion
1:00 pm - 1:25pm	Question/Answer
1:25 pm - 1:30 pm	Closing Remarks
1:30 pm Adjourn	

\$15 AGC members \$25 Non-members

There will be no refunds after 02/12/2010

Name: _____

Company: _____

Address: _____

Email: _____

Phone: _____

We accept the following:

Check made payable to Maryland AGC

Visa/MasterCard/ AmEx

Credit Card Information:

Card#: _____

Exp. Date: _____ Cvv: _____

Please email/fax completed registration to
sue@marylandagc.org Fax 410-339-5273. Thank you

Maryland **AGC**

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