

# BUSINESS OWNER | ENTREPRENEUR STRATEGY SUMMIT

You've built a successful business, and with that success comes opportunity – but also complexity. Whether your focus is on the growth of your business or an exit, it's important to find the right partners.

Take a seat at the table for an exclusive, intimate gathering with us and professionals from Raymond James Investment Banking, as well as prominent tax and legal advisors, growth partners, and branding experts to learn about optimizing the value of your business as you consider your next phase of growth and/or ahead of any sale or merger. As your financial advisors, we will quarterback the relationships and connect your personal wealth plan with your business plan.

WITH OUR GUIDANCE, YOU WILL GAIN VALUABLE INSIGHT INTO:

- Common mistakes and how to prevent them
- Branding your business for growth
- Strategic debt as a growth catalyst
- Pre-sale planning beginning two to three years before the transaction
- The continued evolution of artificial intelligence
- Establishing the fair market value of your business
- Facilitating and structuring the transaction
- Applying tax-mitigation and estate planning strategies to your proceeds
- How selling a percentage of your business to an optimal growth partner now could magnify your returns in a future, secondary transaction

Reserve your seat. RSVP today. Call 617.897.8999. Email [edward.galvin@raymondjames.com](mailto:edward.galvin@raymondjames.com).

**Thursday, May 8, 2025**

Registration & Lunch: 11:30 a.m. | Event: 12:15 p.m. – 5:15 p.m. | Cocktail Hour: 5:15 -

**Harvard Club of Boston**

374 Commonwealth Ave // Boston, MA 02215

(Parking provided in club parking lot at 415 Newbury Street)

**Graham Goodwin, CPWA<sup>®</sup>, AIF<sup>®</sup>, CEPA<sup>®</sup>**

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