



BROUGHT TO YOU BY FORGE - ACCELERATING MANUFACTURER GROWTH THROUGH AN ALLIANCE OF PROFESSIONALS



CAPSULE



It's the Intellectual Capital™



Certified Public Accountants



HOULIHAN LOKEY



The Columns Resource Group



Profit Builder Network



### Location

Fifth Street Towers  
150 South Fifth Street  
Suite 300 ("The Grand")  
Minneapolis, MN 55402

### Directions

[www.fifthstreettowers.com/Directions.axis](http://www.fifthstreettowers.com/Directions.axis).  
Take the elevator from the skyway level to the 3rd floor of the 150 Tower. Suite 300 ("The Grand") is located immediately to the right as you exit the elevator.

### Parking

All entered from Marquette Ave or 2nd Ave between 4th & 5th Streets  
-Fifth Street Tower Garages  
- Downtown Auto Park Ramp  
- Surface Lot Across from Fifth Street Towers

## Business Transition: How Ready are You?

Privately held businesses account for more than 50% of U.S. gross domestic product and employ 82 million people or 62% of the workforce. Given the tremendous impact on our national economy combined with the overwhelming demographics, the need for strategic transition, succession & exit planning advice for privately owned businesses has never been greater. But, who do you listen to? Consultants, Accountants, Attorneys, Financial Advisors all offer experience and perspective. The answer is... all of them. However, the hard part is coordinating their efforts while building and running your business. Fail to plan and the stakes are high. Receiving sub par value at exit, unnecessary or overpaid taxes, loss of loyal employees and unrealized legacy make it worth planning in advance.

Join us on June 24th for networking, open discussion and a confidential real-time transition readiness assessment. Seasoned experts including a CPA, Attorney, Transition Consultant & Financial Advisor will overview a transition planning process and share considerations and factors critical to the success of any transition effort. You will also have an opportunity to share ideas and discuss best practices with other business owner colleagues.

### Panelists

**Ted Capistrant** – CEPA, President, Profit Builder Network

**Mark Gibbs** – CPA, Partner, HLB Tautges Redpath, Ltd.

**Dave Moran** – Shareholder, Winthrop & Weinstine

**Joel Seleskie** – CLU, ChFC, CFP, CASL, Wealth Management Advisor, Northwestern Mutual

### Who Should Attend?

**Business owners** who wish to exit or diminish their current role in the next 1 to 10 years should attend this event to hear & learn from a panel of seasoned professionals about specific tactics, solutions & contingency options to maximize their life's work.

**Senior management and potential successors** that are interested in learning on how to effectively stage their organization for transition. The panel will offer specific tactics & tips for increasing enterprise value.

In addition, there will be opportunities to pose your own questions and get advice from the panelists. Participate in an anonymous electronic transition readiness survey and compare your results to the audience.

### Why Attend?

In 2004, the Federal Reserve reported that U.S. families have approximately \$5.7 trillion in net worth tied up in private businesses. Estate planning experts routinely estimate that fewer than 1/3 of privately held companies succeed in executing a transition to the second generation and less than 10% implement successor leadership plans moving their companies to the third generation.

### R.S.V.P.

By June 18th, at [tinyurl.com/ForgeJune2010](http://tinyurl.com/ForgeJune2010)

### Date

June 24th, 2010

### Time

4:00pm – 6:30pm Interactive presentation, Networking, Refreshments & Hors d'oeuvres

