

UNLOCKING WEALTH: TIMELY STRATEGIES FOR MOVING FAMILY ASSETS

Listen, learn, and ask questions of an experienced group of professionals from PNC Wealth Management, bCatalyst Advisors, the law firm Greenebaum Doll & McDonald and The Global Consulting Partnership. The goal of the seminar is to inform business owners why now may be the optimum time to make the hard decisions to transfer financial and business assets, achieving the best outcomes for families and their businesses in the process.

When: Tuesday, February 23, 2010, 8:30 – 10:30 AM

Where: Greenebaum Doll & McDonald
35th Floor, National City Tower
101 S. Fifth Street
Louisville, KY 40202

Parking: Validated from National City Tower garage (access from Main Street, between 4th and 5th)

Cost: No charge. Refreshments provided

What you will learn

- Strategies for transitioning businesses and family financial assets
- How to prepare your business for market and sale
- Tips for effective intrafamily conflict resolution
- Insights on the current capital markets
- Ways to gain access to innovative capital sources
- Strategies for acting on today's favorable gift and estate planning climate

Sessions

- Insights from the PNC Wealth and Values Survey
- Is your business ready? Now may be a better time than you think to transfer your business
- Psychology of Business or Wealth Transitions: emotional intelligence matters, too
- Optimizing asset transfers in the current environment using partnerships, LLC's and other techniques

For an invitation or more information, contact James Gravitt

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