

## Succession Planning: What it is and how to do it successfully

Business owners constantly hear about the importance of succession planning – yet most don't really address it until very late in the game! Good succession planning is far more than retirement preparation – it needs to also address scenarios when an owner leaves the business, opts to reduce his or her role within the business, and other management changes. Advance groundwork can reap significant and meaningful benefits you may not have considered. Join us for a panel discussion with key succession planning advisors who will help you understand and plan for:

- \* Preparing your business to get the best selling price
- \* Creating a comprehensive succession plan
- \* Discussing succession issues with key stakeholders
- \* Funding the buyout
- \* How a succession plan fits into your business
- \* Scenarios to consider in creating a succession plan
- \* Valuation resources and buyout scenarios

**Location:** **Hyatt Regency Bellevue**  
900 Bellevue Way NE, Bellevue, WA 98004  
(Parking will be validated)

**Date:** August 25, 2010  
2:30 pm — 4:30 pm

**Cost/Register:** \$45. Register by August 23 at [www.equinoxbusinesslaw.com/bellevuelegalseminars.html](http://www.equinoxbusinesslaw.com/bellevuelegalseminars.html)

**More Information:** [www.equinoxbusinesslaw.com/bellevuelegalseminars.html](http://www.equinoxbusinesslaw.com/bellevuelegalseminars.html) or 425-646-2360

### Presenters:

Robert M. Gruber founded The Rainier Group in 1988 because he realized the traditional approach to financial planning and products cannot solve the key issues facing owners of privately held companies. Bob has spent more than 30 years guiding owners of private companies and high net worth individuals through a wide range of complex business, family and financial decisions. That wealth of experience helps make The Rainier Group what it is today: A cutting-edge advisor that marries proprietary financial modeling with the acumen earned by advising more than 700 clients through business and personal transition planning. Bob has been a member of Rotary and is the past chair of Wellspring Family Services of King County. He has also served on the Entrepreneurial Board of Seattle University's School of Business.

Allan Vander Hamm, CPA/ABV, CVA, CM&AA, CExP, is a Principal and the Director of Business Valuation and Transition Services at Berntson Porter & Co. Allan's practice focuses on designing and implementing comprehensive owner succession and transition projects; completing successful Merger & Acquisition transactions; and providing business valuations for transition, transactions, buy-sell agreements, divorce and estate and gift tax purposes. He has been advising clients for over 30 years and has helped many business owners reach their exit and succession goals with financial success and joy. Allan is past Chairman of the Washington Society of CPA's Business Valuation and Litigation Services Committee and holds a Bachelor of Science in Business, Honor Society from the University of California, Berkeley, Haas School of Business.

Michelle Bomberger, founder and Managing Attorney of Equinox Business Law Group PLLC, is an experienced businesswoman turned lawyer. Michelle began her career in business as a consultant with Ernst & Young LLP serving Fortune 500 clients and further deepened her knowledge of business operations as a Senior Manager of Auditing Services at Cingular Wireless. Michelle founded Equinox in 2005 with a mission to help business owners and CEOs find balance in business. Michelle attended graduate school at Northwestern University in Chicago, obtaining a JD from the School of Law and an MBA from the Kellogg Graduate School of Management. She has an undergraduate degree in Finance and Computer Applications from the University of Notre Dame.