

SUCCESSION PLANNING

How Smart Leaders Are Passing Assets to Buyers, Investors, and Future Generations

Presented by **Gene Marks, CPA**



The average age of the U.S. small business owner is about 53 years old, which means that many will be looking to transition from business owner to retirement in the years to come.

But what's the best strategy for you? What are the considerations for passing your business down to family members? What options do you have for selling your company? How should you best prepare your company — and your finances — to best take advantage of today's tax and business laws?

Join "The Succession Advisor" Columnist for Accounting Today and Certified Public Accountant Gene Marks for a fast paced, entertaining and informative discussion where you will better understand your best succession actions you should be taking that benefit yourself, your family and others connected to your business.

During this presentation, Gene will cover the following topics:

- ✓ How the 2017 tax reform will impact your business structuring and life insurance planning.
- ✓ The latest estate planning developments from the recent year that affect business owners like yourself.
- ✓ The key issues in transitioning a business to family members or key employees while providing for financial security.
- ✓ The most important retirement and estate tax considerations you should be taking into account to ensure that your income will be maximized for the years to come.

G E N E
MARKS

**AUTHOR. COLUMNIST.
KEYNOTE SPEAKER.
BUSINESS ADVISOR.**

Forbes 
The Guardian

The Washington Post
accountingTODAY

The New York Times
Entrepreneur.com



Gene's presentations help business owners and managers of all industries to look ahead, with specific actions for growing and profiting based on the strategies of other business owners in their industry.

See Gene in Action
www.GeneMarks.com



Book Gene for your keynote or breakout session

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GENE MARKS

AUTHOR. COLUMNIST. KEYNOTE SPEAKER. BUSINESS ADVISOR.

A past columnist for both The New York Times and The Washington Post, Gene now writes regularly for The Guardian, The Hill, Forbes, The Philadelphia Inquirer, The Washington Times and The Chicago Daily Herald.

Gene also hosts two very popular podcasts: Thrive and Small Biz Ahead where he interviews politicians, economists, policy makers, celebrities and entrepreneurs that impact business.

Gene has written 5 books on business management, specifically geared towards small and medium sized companies. His most recent is *Want More Cash?: 100+ Ideas And Strategies For Increasing Your Company's Cash Flow This Year*.

Nationally, Gene appears regularly on Fox Business, MSNBC, as well as CBS Eye on the World with John Batchelor and SiriusXM's Wharton Business Channel where he talks about the financial, economic and technology issues that affect business leaders today.

Gene owns and operates the Marks Group PC, a highly successful ten-person firm that provides technology and consulting services to small and medium sized businesses.

Prior to starting the Marks Group PC, Gene, a Certified Public Accountant, spent nine years in the entrepreneurial services arm of the international consulting firm KPMG in Philadelphia where he was a Senior Manager.

Through his keynotes and breakout sessions, Gene helps business owners, executives and managers understand the political, economic and technological trends that will affect their companies and—most importantly—the actions they can take to continue to grow and profit.



TESTIMONIALS

👍 "I finally got to hear Gene speak! This was at our National meeting in Orlando. **He is AMAZING!** Our builders loved him and just everything he had to say. Unfortunately, I only caught the last 15 mins or so of his speech due to working at the event for the most part. But just from what I heard **I was "wowed" to say the least.** He is truly amazing at what he does." — *Sylvia Gonzalez, Sales & Marketing Administrator, Nucor Building Systems*

👍 "Good morning, **Gene, without a doubt, your presentation was the best closing session I have ever attended.** I know you are doing the kickoff for Symposium and I'm sure I will be saying the same for the kickoff session. Somehow, you managed to make all the tough news entertaining. It was a master class on presenting." — *Linda Dodd, Learning Specialist, North Carolina Association of CPAs*

👍 "In a word.... **WOW! Gene absolutely delivered.** He was spot on for our small business members. He packed a lot into 45 minutes and left everyone with something to take away. People were taking pictures of his slides during his presentation. The conversations about his keynote continued throughout the day. People said they emailed him right after he got off stage. Others mentioned that they were emailing their own accountants to find out if the advice he was giving could help them. They found out that they were entitled to tax relief or grants that would basically offset their price of attending our show. **That is a tremendous value for our members. We could not be happier. He was fantastic.**" — *Mike Adamson, President & CEO The Aircraft Electronics Association*

👍 "Gene, I would say in my 30 years of attending presentations, yours was **THE MOST: Valuable, relevant, properly paced, perfect amount of info;** not too much, but enough, excellent humor, and **perfectly executed presentation I have experienced.**" — *Jill Keim, VP Relationship Manager, First Merchants Bank*