

# DRAFT 1

Plaza Bank and Auctoris Present

## Business Transition, Succession or Sale

# JUNE 8, 2016

18200 Von Karman Avenue  
Irvine, CA 92612



**Plaza Bank**

ADVANCING SMALL BUSINESS®

# AUCTORIS

ARCHITECTS OF WEALTH PRESERVATION STRATEGIES



**William E. Roberts**

Preservation Advisor  
Director | Global Wealth  
Auctoris

Bill co-founded AUCTORIS, formerly known as Benefit Concepts of Colorado, Inc., in 1978 and serves clients in over 22 States. Bill serves privately held business owners, family businesses and farm and ranch families. *Learn more at [www.auctoris.com](http://www.auctoris.com)*

Auctoris is not affiliated with Plaza Bank and any information provided does not necessarily represent the Bank

## AGENDA

7:00 AM - 7:25 AM Breakfast

7:30 AM - 9:00 AM Workshop

## RSVP

Al De Grassi - Senior Vice President  
at email [adegrassi@plazabank.com](mailto:adegrassi@plazabank.com) or call  
(949) 502-4364

## Business Succession Planning

- Uncover tax consequences that could affect ownership and liquidity
- Ensure that none of the value walks out the door when the owner leaves
- Produce realistic valuations of business assets
- Make sure that your buy-sell agreements are up to date
- Address what would happen in catastrophic events like death or disability of a shareholder
- Find potential landmines in the company's financial statements
- Identify points of distrust within the business
- Pull together the right team of advisors to ensure your goals and objectives are met
- Create the organizational and administrative systems that allow the business to succeed without the owner's involvement

