



Expert Panel - Exit Planning Discussion

You're Invited:
Owners & Trusted Advisors



Moderator: Joe Markovitch
Certified Exit & Succession Planner

Learn more about the exit planning process, current best practices and how a diverse group of expert advisors, working in a coordinated and collaborative way, help business owners maximize the transferable value of their business and leave on their terms.

Wednesday
October 11, 2023
9:00am - 11:30am

8621 201 St.
6th Floor
Langley, BC
V2Y 0G9

Creating Your Exit Plan:

Panelists: Jonathan Osten, Michelle Karby, Myen Lim

Moderator: Joe Markovitch

- Introduction to Exit Planning and the role of the Exit Planner
- The "Exit Planning Table" - the distinct roles of each advisor.
- Protecting business value and tax minimization.
- Life insurance- Application in a Buy/ Sell Arrangement and Shareholder's Agreement.
- Estate planning strategies for owners exiting their business.

Implementing Your Exit Plan:

Panelists: Erica McGuinness, Derek Strong, David Allardice

Moderator: Joe Markovitch

- Preparing & executing a successful transaction process.
- Legal Agreements & Due Diligence Process.
- Financing the Transaction and Valuation.
- Contingency & Continuity Planning.
- Identifying and growing the value drivers in your business.

"Biggest takeaway is that such an extensive planning process does exist and that I personally should not even try to do everything on my own."

Price: \$139.00

[**Register Here**](#)



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Jonathan Osten

Tax Partner, PwC Private

Jonathan Osten is a tax partner in the BC Region Private Company Services group, based both in the Vancouver and Fraser Valley offices. He joined PwC in 2015 and has practiced corporate and personal Canadian tax for 17 years, with a focus on general core Canadian tax consulting.



Michelle Karby

Wills, Estates and Trusts Lawyer (TEP),
Owen Bird Law Corporation

Michelle works with business owners and families across generations to navigate the often sensitive and complex field of estate and incapacity planning. Michelle works with clients to develop individualized estate plans that ensure her client's affairs are in order and their legacy is protected.



Erica McGuinness

CPA, CA, CBV
Partner, Sequeira Partners

Erica has spent more than 10 years advising business owners and entrepreneurs on their corporate finance and M&A activities. She advises the owners of privately held corporations in selling their interests or sourcing growth capital and typically works on transactions \$20M to \$250M of Enterprise Value. Erica has built her reputation on leading client service, with experience across multiple industries and business models.



Myen Lim

CPA, CA, CFP, FEA
Associate, Principal, The Targeted
Strategies Group

Myen has over twenty years of accumulated experience in insurance, tax, estate and financial planning. Whether it is preserving or enhancing wealth that her clients have created or leaving a lasting legacy to their beneficiaries, Myen is committed to helping them articulate their goals and implement them using life insurance strategies and solutions.

"I really enjoyed the Panel Discussion and the fact that you bring in experts in different professions to help an Owner prepare themselves and their business for a transition."



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David Allardice
Managing Principal
Miller Titerle + Company

David is the managing principal of Miller Titerle + Company and leads the firm's Business Law Group and Mergers + Acquisitions Team. David's practice focuses on middle-market mergers and acquisitions and complex commercial transactions.



Derek Strong
Regional Vice President
Roynat Capital

Derek is a 30-year veteran of the Pacific Northwest financial community, having spent the last 25 years with Roynat Capital. Derek's role with Roynat is directing their Pacific Northwest operations which include a \$1B debt and equity portfolio of mid-market Companies with loans and Investments in the \$1-\$50MM range.



Joe Markovitch

Certified Exit & Succession Planner
(moderator)

Joe Markovitch is a Certified Exit Planner, and Co-founder of Solly's Bagelry. Joe has more than 30 years of SME business experience in the Vancouver market. Joe's personal business exit experience and the exit stories of many former owners motivated his interest to guide owners to a better way of exiting their business.



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This expert panel discussion will be **interactive** with time for your questions as well as **links to resource materials**, tips, and white papers on **industry best practices**.

To allow enough time for questions and a shared learning environment experience, **space is limited**.

"I was very pleased to attend the discussion as a guest and look forward to attending other, similar, events in the future if the opportunities present. I found the content and format to be very appropriate."

Reserve your seat today.



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