



Business Succession & Transition Seminar

Join us as local leaders gather to discuss
the importance of planning ahead for your business

Tuesday, June 25th
8:30am - 10:00am
649 West Dixie Ave
Elizabethtown, KY 42701

Speakers to Include

CARRIE GREY, CPA, CVA - CERITY PARTNERS
JASON HILL, CPA, CEPA - CERITY PARTNERS
JOSH HERMAN - CERITY PARTNERS
DEAN DURBIN, PROFESSIONAL ENTREPRENEURIAL OPERATING SYSTEM (EOS) IMPLEMENTER
DUSTIN HAYES, VICE PRESIDENT - MAGNOLIA BANK
AMANDA HEADY, VICE PRESIDENT - MAGNOLIA BANK

Facilitated by:

Amanda Heady, Vice President
NMLS #825223
aheady@magnoliabank.com
270-234-6097



Dustin Hayes, Vice President
NMLS #1479801
dhayes@magnoliabank.com
270-777-5348



To RSVP, please contact Amanda or Dustin.



Business Succession & Transition Seminar

Opening Remarks

Amanda Heady & Dustin Hayes - Magnolia Bank

Speakers

Carrie Grey, CPA, CVA - Cerity Partners

Jason Hill, CPA, CEPA - Cerity Partners

Josh Herman - Cerity Partners

Our guests from Cerity Partners will be discussing:

- Why succession planning is important for business owners
- Structuring the sale of a business
- How to determine the value of a business

Dean Durbin, Professional Entrepreneurial Operating System (EOS) Implementer

Mr. Durbin will be discussing:

- How EOS can prepare a business for sale
- Briefly discussing the mechanics of the sales process itself and how “creating a market” for a business helps a seller and greatly adds to a successful close

Amanda Heady, Vice President, Magnolia Bank

Dustin Hayes, Vice President, Magnolia Bank

Amanda and Dustin will be discussing:

- Financing a business purchase or transition
- What banks look for as the business prepares for this process

Closing



Amanda Heady, Vice President
NMLS #825223
aheady@magnoliabank.com
270-234-6097



Dustin Hayes, Vice President
NMLS #1479801
dhayes@magnoliabank.com
270-777-5348