



## YOUR EXIT

# SUCCESSION STRATEGIES FOR YOUR BUSINESS

Presented by **GENE MARKS**



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 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 Gene's presentation you will learn:

- ✓ 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.

"Our group loved you last year. You got the highest score of any speaker."



**David Perry**, Executive Editor  
Furniture Today

"We got some preliminary results back from our follow-up survey, and Gene was our top ranked speaker. He did a great job, the content was highly accessible, and he was really nice to work with"



**Dan Marx**, Director of Content Development  
Specialty Graphic Imaging Association

Gene's presentations help business owners & managers look ahead, making sure they are educated on critical issues affecting their industries.

Book Gene for your keynote or breakout session



CALL CARYN TODAY  
(610) 675-7648

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See Gene in Action [www.GeneMarks.com](http://www.GeneMarks.com)



# GENE MARKS

AUTHOR. COLUMNIST. KEYNOTE SPEAKER. BUSINESS EXPERT.



Forbes Inc.

Entrepreneur.com



The New York Times

The Washington Post

A past columnist for both The New York Times and The Washington Post, Gene now writes regularly for The Hill, The Philadelphia Inquirer, Forbes, Inc. Magazine, Entrepreneur Magazine and Fox Business.

Gene has written 5 books on business management, specifically geared towards small and medium sized companies. His most recent is The Manufacturer's Book of Lists.

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

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.

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.

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Gene was a huge hit. I commented “what a way to close the conference.”

**Lynn Smith**, Manager of Meetings, The American Foundry Society (AFS)

Our group enjoyed Gene—his was the highest rated presentation at PEMA's Annual Meeting.

**Susan A. Denston**, QAS, Executive Director, Process Equipment Manufacturers' Association

Gene, hands down one of my favorite things last week at the WWEMA conference was your presentation. When you get a chance can you forward your presentation to me.

**Rich Cavagnaro**, President & CEO, AdEdge Water Technologies/Water & Wastewater Equipment Manufacturer's Association

