

January 23, 2019 Event / CLE

Topics

Business Transitions
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Business Transition Planning for Financial Advisors

Financial Planning Association of Oregon & S.W. Washington Chapter
Meeting | Portland, Oregon

Jeff Bird will present “Business Transition Planning for Financial Advisors” at the Financial Planning Association of Oregon & S.W. Washington’s Chapter Meeting on Wednesday, January 23. Bird’s presentation will cover key issues that financial planners need to know about business transitions, including:

- The current landscape as baby boomers retire in unprecedented numbers,
- How to help clients navigate the transition externally to third parties or internally to family members or key management,
- The impact of the value of these businesses on the client’s net worth,
- How the success or failure of the business transition will have huge consequences on the resources available for retirement, and
- Navigating retirement planning successfully with a business owner.

The event will take place from 11:30 a.m. to 1:30 p.m. at the Multnomah Athletic Club in Portland, Oregon.