



JOIN US FOR A CONTINUING EDUCATION LUNCH
FOR BUSINESS OWNERS & THE PROFESSIONALS THAT SUPPORT THEM

The **6%** **ADVANTAGE**™

CAPTURING 6 CRUCIAL OPPORTUNITIES **WHEN **SELLING YOUR COMPANY****



Maximize all your years of hard work by proactively planning for the sale of your business to launch you into the retirement lifestyle of your dreams.



Identify the 6 crucial opportunities that are available to you pre-sale, during and post-sale, and some tips for ensuring you don't miss out on minimizing taxes.



Gain confidence in taking the next step toward your goals and connect with professionals who specialize in supporting business owners through the exit phase.

YOUR HOSTS



DAVID ROSELL
Founder & Chief
Prosperity Officer



EMMA JAMES
Partner & Wealth
Coordinator



Exemplar Wealth Advisors specializes in helping individuals and families navigate transformational events—whether the sale of a business, an inheritance, or a life insurance settlement. Through proactive planning to minimize taxes and capture available opportunities, we strive to empower our clients to build wealth aligned with their values, goals, and envisioned legacy. We have proudly served the Bend, Oregon community and beyond for over 25 years.

SEPTEMBER 2

AGENDA

11:45AM - Noon PST:

- Networking

Noon - 1PM PST:

- Program & Discussion

A light lunch will be provided for in-person guests.

Catered by:



JOIN US

IN PERSON:

Exemplar Wealth Advisors
550 NW Franklin Ave, STE 368
Bend, OR 97703

VIRTUALLY:

Zoom link to be sent upon
registration

RSVP HERE

QUESTIONS?

Contact us at 541-385-8831 or
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www.XMPLR.com

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