

Thursday Insights for March 2020

2:30 p.m. – 4:00 p.m.

March 5, 2020 – Are You Referable?; *Presented by Shelley Lightfoot, CEPA and Joe Strazzeri, Esq.*

We are living in a time when extraordinary estate and wealth strategies planning advisors are needed like never before. As a result, the public is searching for answers on how to preserve and protect what they have; and for answers on how to thrive into the future. This course is a dialogue on professional collaboration and the type of practice your referral sources and clients experience – your practice as seen through the eyes of others. Shelley will share techniques you and your team may use to gain the skills and quiet confidence to position your practice in the forefront of your community and you can become a “referable” resource to others. Your practice is like no other and should be unique to you.

March 12, 2020 – Someone is Interested in Buying My Business – What Do I Do Now?; *Presented by Greg Banner, CFP, CLU, CRTP and Trever Acers, Managing Director of Objective Capital*

How do you respond when someone expresses interest in acquiring your company? This presentation includes guidance on how to help your client respond to the interest, how to assess if a sale at this time will help your client achieve their objectives, and how to navigate the process should they determine to take the next step. Greg will provide real-world insight and a few simple exercises to determine the factors that matter most to achieve a “successful” sale. This pragmatic dialogue will strengthen your ability to assess and help your client take advantage of these exciting opportunities when they occur.

March 19, 2020 – SCI Spring Mixer – A St. Patrick’s Day Celebration

While we often come together for education and collegiality, let’s take this opportunity to just enjoy each other’s company and celebrate St. Patrick’s Day – a couple days late. The Southern California Institute invites you to learn interesting facts about Saint Patrick’s Day, sample spirited Irish drinks, and taste traditional Irish eats!



March 26, 2020 – Dissecting a Financial Statement; *Presented by Melisa Silverman JD, CEPA, CVA, SBA, CMEA, and Jeffrey Kates, MBA, CEPA*

Financial statements are more than just numbers, they are a way for you to identify growth and/or financing opportunities and potential issues to remediate prior to escalation. Join Melisa and Jeff as they dissect financial statements to help you: understand key components of balance sheets; ensure that your clients have their financial reporting available (and accurate on a timely basis); and get a high level understanding of the client’s financial situation. This will be a session to help you understand that understanding the financial statements is NOT a substitute for a complete analysis of the client.