Bank of America Merrill Lynch

ROSE LAW FIRM

DOTY PRUETT WILSON PC
CERTIFIED PUBLIC ACCOUNTANTS

The Importance of Business Transition Planning

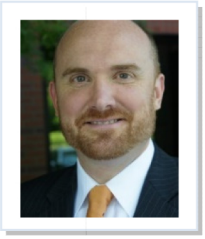
With **Adam Rose** (Business Transitions Law, Rose Law Firm, PC)
and **Doug Doty** (Doty Pruett Wilson, PC)

Date: Tuesday March 20th, 2018 | 4:00pm - 7:00pm
Venue: Creekside Golf Club, 6250 Club House Dr SE, Salem, OR 97306
Responses by: Friday March 9th, 2018 – seats are limited!
Cost: No charge

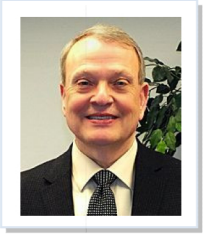
Please join **Bank of America Merrill Lynch** for an evening of discussion regarding the planning and implementation of Business Succession/Transition Planning.

Adam Rose (Business Transitions Law, Rose Law Firm, P.C.) and **Doug Doty** (Doty Pruett Wilson, PC) will share a framework for identifying issues and provide examples of strategies and solutions for business owners who are considering how to plan for and navigate a successful business ownership transition for themselves, their company, and their family.

This event is designed for owners of middle-market corporations who have built successful businesses and who now desire to position themselves to maximize the advantages, financial and otherwise, that they can achieve from the successful business that they have built.



Adam Rose | Owner | Business Transitions Law | Rose Law Firm P.C.
Adam Rose is the owner and founder of the Business Transitions Law (Rose Law Firm P.C.). This Lake Oswego firm is dedicated to helping business owners transition their business - whether it be a sale, a private equity recapitalization, ESOP, management buyout or other transition option. Adam has worked with corporate clients for over two decades and is regularly called upon to present to business owners, lawyers, CPAs, and other financial professionals. Adam graduated with his J.D. in 1997 from Harvard Law School and is licensed to practice law in Oregon, Washington, and the U.S. District Court, District of Oregon.



Doug Doty | Founding Partner, CPA | Doty Pruett Wilson, PC
Douglas W. Doty started his career at a large public accounting firm gaining 10 years of valuable experience. He then decided to start his own accounting firm where he could focus his ability in assisting clients to better understand their financial challenges and opportunities. Doty Pruett Wilson, PC (formerly Doty & Company, PC) opened its doors on April 1, 1981 with a staff consisting of one bookkeeper and himself. Throughout his career, Doug has lived his passion by providing dynamic tax plans to clients which has included being involved with hundreds of business transition transactions. More than 35 years later, the firm of Doty Pruett Wilson, PC has 32 employees with 10 CPAs on staff and Doug still gets a thrill out of meeting with clients and helping them put tax strategies in place to continue to move them towards achieving their long-term dreams and goals.

AGENDA

4:00 – 4:15pm	-	Guest Registration
4:30 – 5:30pm	-	Presentation
5:30 – 6:00pm	-	Q&A Session
6:00 – 7:00pm	-	Cocktails / Networking Hour