

10TH ANNIVERSARY
FOLEYTECH
SUMMIT



TECHNOLOGY IN MOTION

CONTENT, DELIVERY, AND SECURITY IN A CONNECTED WORLD

Jere Doyle

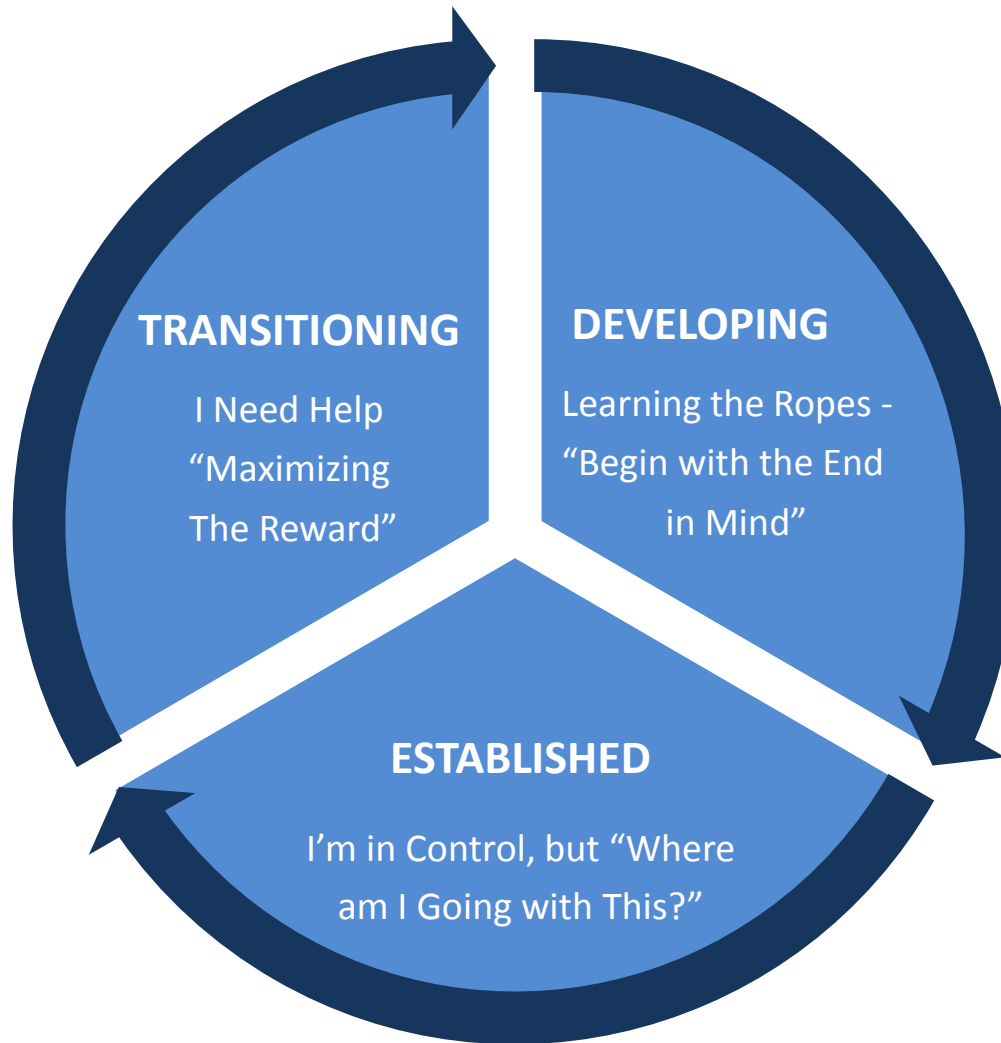
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BNY Mellon Wealth Management



EVOLUTION OF AN ENTREPRENEUR

“OWNER TO INVESTOR”

The 5 Critical Issues at Each Phase



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DEVELOPING

“Begin with the End in Mind”

- Structure the Business to Maximize Long-Term Goals
- Implement Senior Executive Compensation Plans that Drive Results
- Execute Buy/Sell Agreements
- Have an Estate Plan in Place
- Consider Banking as Financing

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ESTABLISHED

“Where am I Going with This?”

- Re-evaluate Exit Strategy Given Current Conditions
- Consider Gifting to Family Members
- Implement More Sophisticated Estate Planning Techniques
- Re-evaluate Your Advisory Team
- Determine the “Real Market Value” of the Company

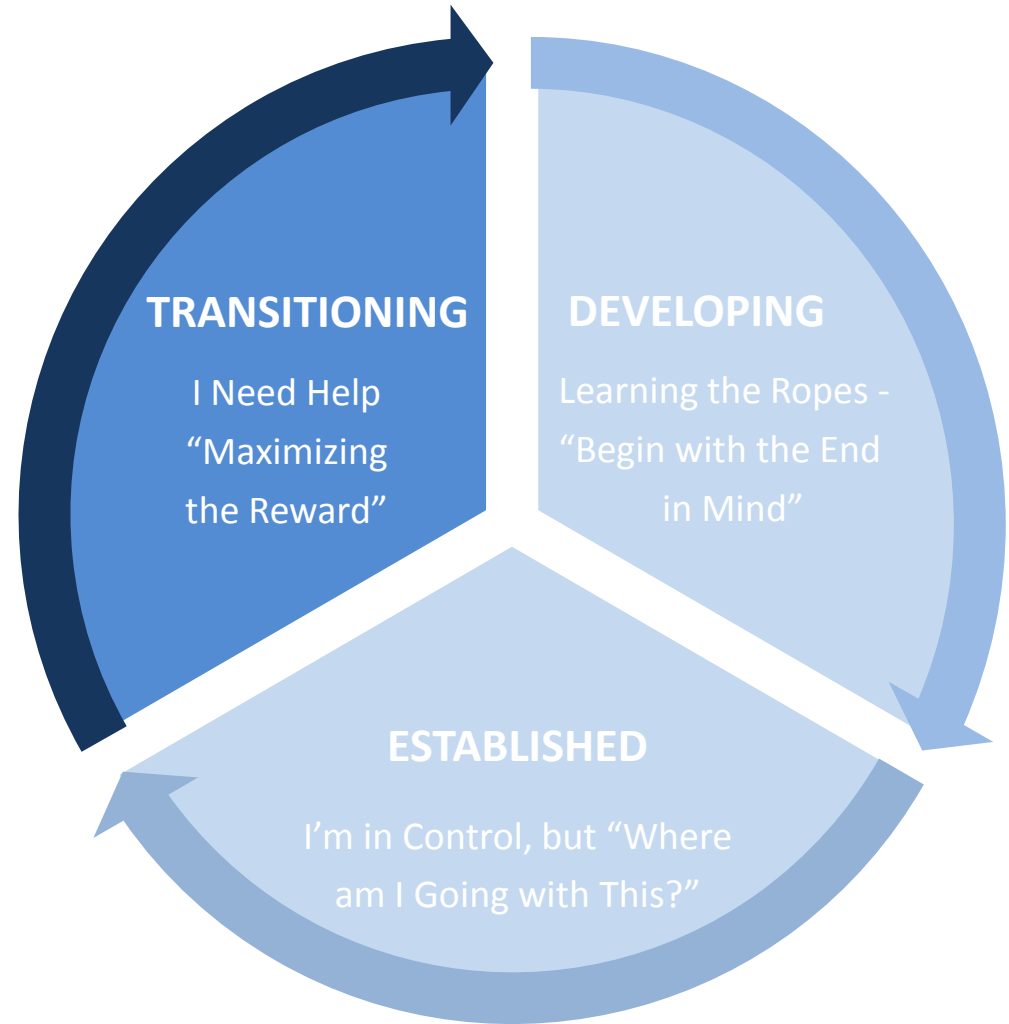
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TRANSITIONING

“Maximizing the Reward”

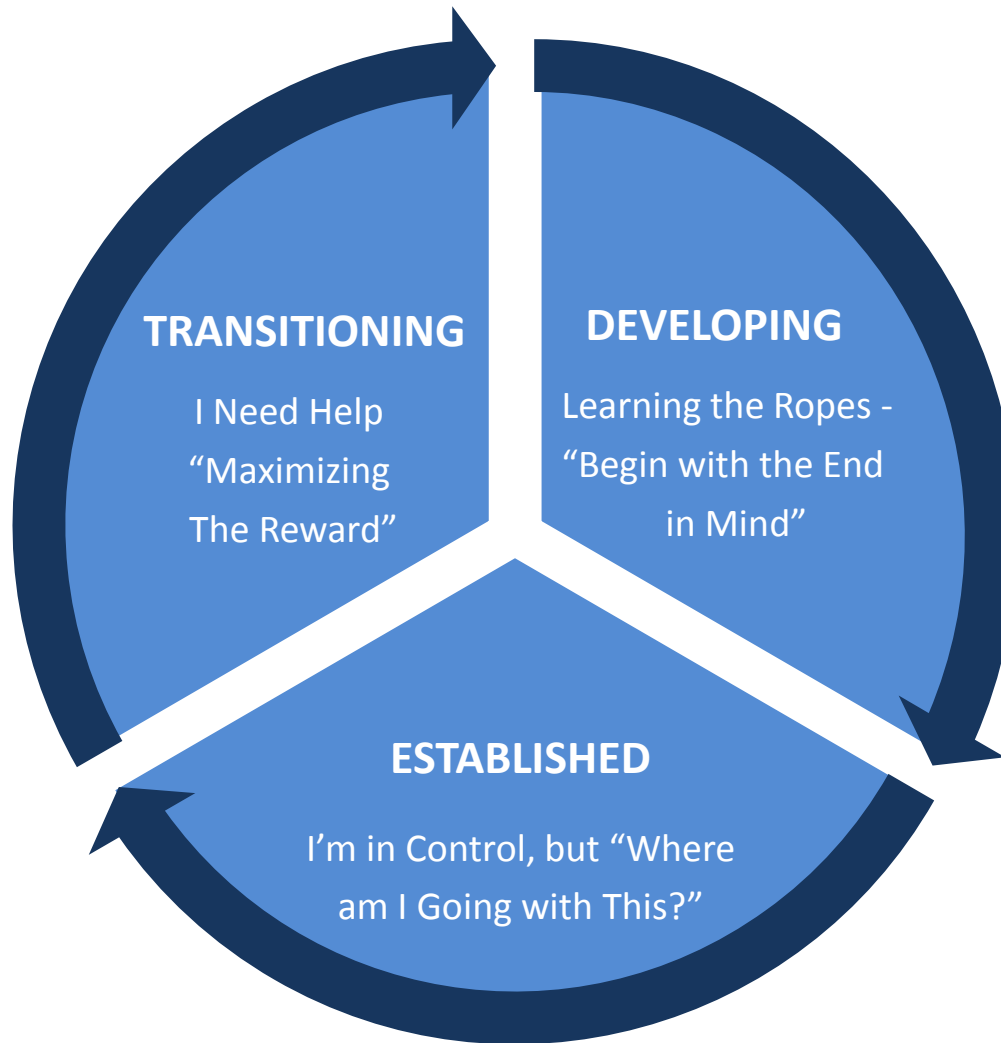
- Determine How Much Money Will be Enough
- Assemble “A” Team of “Transition Advisors”
- Determine Best Structure of a Sale
- Carefully Consider Domicile
- Transitioning from “Owner to Investor”



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