

# Executive Briefing: Creating Enterprise Value, M&A, and Wealth Planning

November 29, 2017

Creating enterprise value is both a short and long term executive priority. Building a plan and a team designed to maximize ongoing valuation and flexibly respond to dynamic M&A markets and Wealth Planning priorities is important for Owner Presidents, CEOs, and CFOs. You are invited to join us for a robust briefing and discussion around these topics.

Panelists will include:

**Derek Mohamed**, Managing Director-Wealth Management, *Merrill Lynch, Pierce, Fenner & Smith, Inc.* – @MerrillLynch

**Michael Stowe**, Partner, *Stowe & Degon LLC* – @StoweDegon

**Shannon Zollo**, Partner, *Morse*

