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Blueprints for Business Owners

GUEST SPEAKERS:

Z. Christopher Mercer, ASA, CFA

AND

William S. White, JD, CLU, CFP

Northern Trust

BLUEPRINTS FOR TOMORROW

Z. Christopher Mercer, ASA, CFA Christopher is the founder and chief financial officer of Mercer Capital, a business valuation and investment banking firm serving a global client base. His valuation career began in the late 1970's and since that time he has prepared, overseen or contributed to hundreds of valuations for purposes related to M & A, litigation and tax, among others. A prolific author on valuation-related topics and a respected speaker on business valuation issues for national professional associations and other business and professional groups, Christopher's most recent published materials are *Business Valuation: An Integrated Theory*, Second Edition (John Wiley & Sons) and an Estate Planners Guide to Revenue Ruling 59-60 (Peabody Publishing, LP)

Bill White serves as Managing Member of Business and Estate Planning Analytics (www.bepapllc.com). Previously he served as general counsel at Thomas Brady & Associates in Boston, and the ESOP Advisors Group in San Mateo, California from 2007 to 2009. Before that he was an in-house tax planning counsel at Securian Financial for 10 years, preceded by five years in private practice with Chandler & Brown law firm in St. Paul and Lommen Abdo law firm in Minneapolis. Bill graduated with honors from The Catholic University of America and from William Mitchell College of Law. He is a frequent lecturer and author in the area of business exit and transition planning.

- Sample Legal Forms Contributor, Bogert Trusts and Trustees, rev. 3d (Thomson Reuters/West).
- Succession Planning Strategies for Professional Associations, Dec. 2008 issue of *Estate Planning.*
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- 2003-2007, Assistant Editor, Insights & Strategies, a monthly financial and estate planning newsletter for professionals.

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Z. Christopher Mercer, ASA, CFA
Founder and CEO
Mercer Capital

— AND —

Advanced Business Succession

Coordinating Buy-Sell Planning with Estate Planning

featuring

William S. White, JD, CLU, CFP
Business & Estate Planning Analytics, PLLC

Thursday, August 26, 2010
3:00 PM Presentation
followed by cocktails and hors d'oeuvres

Northern Trust
1100 East Las Olas Blvd.
Fort Lauderdale

Kindly RSVP by calling 954-768-4046 or by e-mail to LasOlasRSVP1@ntrs.com.