Strategic Financial Planning for Entrepreneurs

Harnessing Pre-liquidity and Qualified Small Business Stock

Over the next five years, potentially millions of closely held U.S. businesses are expected to sell. Business owners and founders have exerted themselves for years - for decades - and through thick and thin to nourish and build a tremendous asset; an asset that, in many instances, represents the largest asset on their balance sheet.

Yet, unfortunately, many who find themselves in a position to exit underestimate what's required for a *successful* sale. The ramifications run the gamut - opportunities not optimized to those that are missed altogether.

Please join us for a Zoom conversation with Joyce Crivellari and Rebecca Sterling, Senior Wealth Strategists with UBS's Advanced Planning Group, where we will be taking a deep dive into strategic financial planning for business owners.

Topics to be discussed:

- Pre-liquidity transfer planning, a powerful tool in estate planning that can help minimize the taxable estate for entrepreneurs.
- Qualified Small Business Stock (QSBS) and why it's instrumental for business owners who plan on monetizing their ventures in the future.

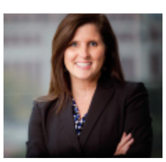
Thursday, July 20, 2023
1:00 PM – 1:30 PM CST

RSVP
Please RSVP HERE

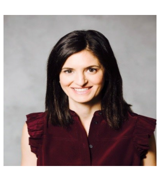
Location
Zoom Call

ATX Wealth Partners
UBS Financial Services Inc.
98 San Jacinto Blvd. Suite 600
Austin, TX 78701

Guest Speakers



Joyce Crivellari
Executive Director
Senior Wealth Strategist
Advanced Planning Group
UBS Financial Services Inc.



Rebecca Sterling
Executive Director
Senior Wealth Strategist
Advanced Planning Group
UBS Financial Services Inc.

Hosted by ATX Wealth Partners

Jason Chirogianis, CEPA®
Senior Vice President
Private Wealth Advisor
UBS Financial Services Inc.

Josh Pottinger, CIMA®, CEPA®
Senior Vice President
Private Wealth Advisor
UBS Financial Services Inc.

Guest Bios

Joyce Crivellari
Executive Director
Senior Wealth Strategist
Advanced Planning Group

Joyce works with ultra-high net worth clients of UBS and is able to help coordinate their investment, estate planning and philanthropic goals. Joyce focuses on developing and implementing creative and comprehensive strategies to assist clients with their complex financial needs such as preservation, transfer and management of wealth. She also reviews clients' estate planning documents to help ensure that the plan accurately reflects the family's philosophy, needs and objectives.

Prior to joining UBS in 2008, Joyce practiced law with the law firms of Fox & Associates, LLP, in Houston, Texas and Barnes & Karisch, P.C. in Austin, Texas. Joyce's practice focused on estate and gift tax planning, business planning and estate administration for ultra-high net worth individuals, families and business owners.

A graduate of Texas Christian University, Joyce received a B.S. in Secondary Education. She went on to earn a J.D. from St. Mary's University School of Law.

Rebecca Sterling
Executive Director
Senior Wealth Strategist
Advanced Planning Group

Rebecca works with ultra-high net worth families, to identify, and educate clients on opportunities to maximize tax efficiencies, estate planning, and philanthropic objectives. Rebecca focuses on developing and helping clients implement comprehensive wealth transfer strategies that align with their wishes. She reviews clients' tax and estate planning documents to ensure that each plan accurately reflects the family's goals and objectives while increasing tax efficiencies.

Prior to rejoining UBS in 2021, Rebecca worked at First Republic Private Wealth Management, where she advised clients on tax and estate planning matters. Rebecca also previously worked at UBS as a Senior Wealth Strategist from 2015-2020. Rebecca began her career as a trusts and estates attorney at Loeb & Loeb in Los Angeles.

Rebecca earned a B.A. in Spanish and Art History from Georgetown University, a J.D. from Temple University School of Law (cum laude), where she was an editor of the Temple law review, and an LL.M.
(Master of Laws in Taxation) from NYU School of Law, where she was a graduate editor of the tax law review, and she earned the Harry J. Rudick award for excellence in taxation, and the David H. Moses prize for the highest GPA in the LL.M. program.