

# NEW!

# BUYING & SELLING A BUSINESS WORKSHOP

WEDNESDAY, JUNE 13, 2018 | LIVONIA



RECOMMENDED CPE CREDIT: UP TO 4 OTHER HOURS

Laurel Manor, 39000 Schoolcraft Road, Livonia, 48150

Registration: 8 A.M. | Program: 8:30 A.M. – 12:05 P.M. | Course Code: 71639

\$139 for members / \$214 for non-members (add \$15 for printed materials)

**REGISTER: [MICPA.ORG/4BSBW](https://micpa.org/4BSBW)**

## **new** 4-HOUR WORKSHOP

### FEATURED PRESENTATIONS:

#### **BUYING & SELLING A BUSINESS & YOU: HOW CPAS, ATTORNEYS AND BANKERS ALL PLAY A VITAL ROLE**

Explore a case study to illustrate a real-life example when a non-publicly traded company is in a buy or sell situation with 100 percent closeout.

**GARY N. LEWIS** – Managing Director, Cascade Partners, Southfield

#### **FLIP OR FLOP: HOW PREP CAN MAKE OR BREAK A DEAL**

Legal structuring, wealth transfer planning, due diligence and reverse legal due diligence, valuation principles and timing are all covered in this engaging session.

**J. MICHAEL BROWN, SERIES 7, 63, 82** – Partner & Managing Director, Charter Capital Partners, Grand Rapids

**MICHAEL D. LORENZ, CPA, JD** – Partner, Cohen & Company, Saint Clair Shores

**CHRISTOPHER J. MOCERI, JD** – Partner and Co-Chair of Corporate Practice Group, Jaffe Raitt Heuer & Weiss PC, Southfield

#### **THE DEAL & AFTERWARD: BE PART OF A DREAM-TEAM FOR YOUR CLIENT**

Discover the steps of an active deal, starting with a letter of intent and marketing, buyer due diligence, and the purchase agreement followed by closing and post-deal.

**KEVIN T. BLOCK, JD** – Member, Kerr Russell & Weber, PLC, Detroit

**SCOTT A. EISENBERG, CPA** – Managing Partner, Amherst Partners, LLC, Birmingham

**BRADFORD J. SOUTHERN, CPA/ABV, ASA, CFF** – Principal, UHY Advisors, Sterling Heights

(See back for additional details)

**MICPA**

## FEATURED PRESENTATIONS:

### BUYING & SELLING A BUSINESS & YOU: HOW CPAs, ATTORNEYS AND BANKERS ALL PLAY A VITAL ROLE

Learn the ins and outs of buying and selling a business through practical considerations and steps all parties can follow. We will explore a case study to illustrate a real-life example when a non-publicly traded company is in a buy or sell situation with 100 percent closeout.

**GARY N. LEWIS – Managing Director, Cascade Partners, Southfield**

### FLIP OR FLOP: HOW PREP CAN MAKE OR BREAK A DEAL

From the CPA or attorney perspective, when a client is considering the sale of their business, be ready to be of value to them during deliberations and exploration. Legal structuring, wealth transfer planning, due diligence and reverse legal due diligence, valuation principles and timing are all covered in this session. Much like priming walls and taping trim makes a paint job successful, the preparation before a deal can make the difference between a successful sale and one that flops.

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### THE DEAL & AFTERWARD: BE PART OF A DREAM-TEAM FOR YOUR CLIENT

The deal is happening- now what? Bring together trusted partners to create a dream-team for your client as the bulk of the work begins. With CPAs and attorneys working side-by-side, the process of buying and selling a business can go much more smoothly and solidify a trust-filled relationship with your client. We cover the steps of an active deal, starting with a letter of intent and marketing, buyer due diligence, and the purchase agreement. Then, we cover closing and post-deal. In all, key employees, vendors, and customers are addressed, as well as deal structure, indemnity, capital adjustments, and much more. The human changes and legal changes associated with buying and selling a business are addressed with equal weight.

**KEVIN T. BLOCK, JD – Member, Kerr Russell & Weber, PLC, Detroit**

**SCOTT A. EISENBERG, CPA – Managing Partner, Amherst Partners, LLC, Birmingham**

**BRADFORD J. SOUTHERN, CPA/ABV, ASA, CFF – Principal, UHY Advisors, Sterling Heights**

### **new** EARLY BIRD:

#### MICHIGAN SPECIFIC ETHICS 2018-19 EDITION

What you don't know, can hurt you. From obtaining a firm license or figuring out what qualifies as CPE, to the Bureau of Professional Licensing's actions against CPAs that don't comply- we explore case studies in Michigan's Accountancy law and Administrative Rule.

**JOSEPH C. HEFFERNAN, CPA – Retired Partner, Governmental Practice, Plante Moran, PLLC, Southfield**

Course Code: 71177

Recommended CPE Credit: 1 hour of Michigan Specific Ethics as now required by the State

**FREE – Special Introductory Offer**



# MICPA

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