

# 2019 SUMMIT xpx

Is this the Right Time for you?



MARCH 12, 2019 [Snow Date: April 9, 2019]

12:30PM – 7:00PM

Nutter McClennen & Fish LLP, 155 Seaport Blvd, Boston, MA

OPENING KEYNOTE  
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KEYNOTE SPEAKER: THE MACRO ECONOMY –  
When is the right time in the overall market?

## JEFF MORTIMER

Director of Investment Strategy for BNY Mellon Wealth Management

PANEL: M&A MARKET–

When is the right time for different kinds of buyers?

*Moderator: Shannon Zollo, M&A, P/E Attorney at Nutter*

*Panelists:*

**Dara Mitchell**, VP, Corporate Development at Kadant

**Rich Glassman**, Partner, Schatz Brown Glassman LLP

**Doug Baumel**, Founding Partner, Continuity Family Business Consulting, Author & Speaker

**Julia Karol**, President & COO, Watermill Group

PANEL: COMPANIES –

When is the right time strategically?

*Moderator: David Poulin, SR VP at RBC Wealth Management*

*Panelists:*

**Bob Furlong**, Former President of Copley Flair

**Craig Bovaird**, President of Builtrite Tool & Die, Inc.

**Gigi Wang**, CEO of Invoke Solutions, Inc.

**Ryan Kim**, Consumer & Industrial Private Equity Investor at Castle Island Partners

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## IS THIS THE RIGHT TIME FOR YOU?

Understand the current economic conditions, the marketability of your business and your personal readiness to find out if it is the right time for you to exit.

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PANEL: OWNERS –

When is the right time for you personally?

*Moderator: Derek Mohamed, Managing Director, Mohamed-Merola Wealth Management*

*Panelists:*

**Nancy Nager**, President & CEO of SBSC, Inc.

**Hal Charnley**, Former CEO of Mobee, former CEO of Net Clarity, former CEO of Artel Video Systems.

**Gene Fax**, Co-Founder & Chairman of the Board – Cadmus Group

**Dr. Nesbitt Hagood**, President & CEO Triib, Inc; former President, Founder and CEO of Pixtronix, Inc.

CLOSING KEYNOTE  
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Mohamed-Merola  
Wealth Management

KEYNOTE SPEAKER: THE DEAL ECONOMY -

How should you think about the market?

## BROOKS GALLAGHER

Director, Private Sale Referral Network, Bank of America Merrill Lynch

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