

**SAN ANTONIO
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2021 SUMMIT xpx
FINDING YOUR PATH

OCTOBER 12, 2021

San Antonio Colonnade Hotel
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9821 Colonnade Blvd, San Antonio, TX 78230
Registration starts at 8:00 am

Sooner or later, every owner exits his or her business. Planning allows you to control the time frame, method and proceeds of your transition. If you plan to sell your business, join us at our Fourth Annual Summit and maximize your results while you minimize your headaches.

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Steven Bankler
CPA, PFS, Cr.FA, CFF, CGMA
President and Chair
XPX San Antonio

LETTER FROM THE PRESIDENT

The Fourth Annual San Antonio Exit Planning Summit is underway! Welcome!

A sincere thanks once again to the San Antonio Business Journal for making this event possible along with Steven Bankler, CPA, Ltd.'s co-sponsor, The Rosenblatt Law Firm. Like last year, which was 100% virtual, making this event possible (both in person and virtual) in 2021 is a great achievement. I would like to thank the committee who assisted and planned this event. I also want to thank those professionals who volunteered and recruited clients for today's panel discussions.

The Exit Planning Exchange (XPX) San Antonio Chapter is a Texas non-profit educational association. We bring together professionals who share one commonality: We each help business owners plan ahead for their grand business exit.

Privately held businesses continue to be tested like never before. Some were forced to close, others are still clawing their way back to normalcy, still others have found profit and success in ways they never have before. Despite these many differences, one constant remains: Every business owner will exit their business at some point. And whatever exit plan was (or was not) in place pre-pandemic, those same strategies may no longer work.

Exit planning is critical. It's also complex. No one advisor understands all the complexities of preparing for a transaction, executing it, and embarking on the next stage. That's why our membership includes accountants, attorneys, appraisers, coaches, consultants, business brokers, bankers, insurance specialists, financial planners and wealth managers. XPX San Antonio is a place where these advisors come together to form cooperative working groups, helping privately held businesses exit their businesses successfully.

It's through this forum—the XPX Summit—that we make our skills available to business owners across San Antonio. If you are within ten years of a planned transition from your business, the information our members will share today will help you along every step of the way. If you're behind on planning and the past year revealed to you how unprepared you may be, we're here for you, too. It's never too late to consult advisors to help you understand how you can take control of your business succession and exit on your own terms. This forum—led by the advising members of XPX San Antonio—is a great first step.

Thank you for attending!

Steven Bankler, CPA, PFS, Cr.FA, CFF, CGMA
President
XPX San Antonio



XPX is a multispecialty organization for professionals who work with business owners. Unlike most such organizations, it is organized around the clients and the concept of cooperative working groups. Successfully exiting a company is complex, and requires coordination between multiple disciplines.

XPX fills a need by giving advisors an opportunity to better understand the skills of their colleagues, and how each team member's work impacts the others.

"XPX offers excellent content based seminars specifically geared towards professionals focusing on the sale or transition of a business. The diverse topics and membership provide strong networking opportunities."

Michael Clear, Wiggins and Dana

"I really enjoy the small group interactions at XPX, which is different from other organizations."

Alan Booth, Executive Leadership Advisor

"The most valuable part of my participation with XPX is the education about exit planning that I have received from attending meetings and from all the members. XPX is a very approachable group. Everyone is willing and interested in an exchange of ideas. I especially like the Power of Three which enables you to get to know other members better."

Dick Albu, Albu Consulting LLC

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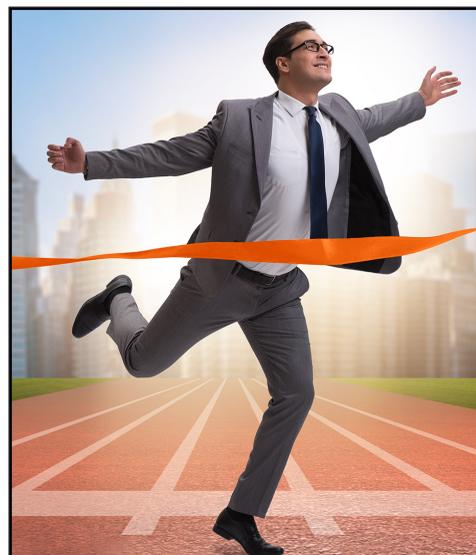
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AGENDA

8:15 – 8:50	Registration
8:50 – 9:00	Welcome and announcements from XPX San Antonio President, Steven Bankler
9:00 – 9:40	“All in the Family” Bjorn’s Audio Video Home Theater
9:45 – 10:15	“Deal Caught Covid” Eldridge Electric
10:15 – 10:30	BREAK
10:30 – 11:10	“If At First You Don’t Succeed” Silber & Associates and Highland Commissioning
11:15 – 12:00	“Double ESOP Success” Alterman, Inc.
12:00 – 12:50	LUNCH
12:15 – 12:45	“Dismal D’s” Kimberly Ford, Carolyn Smith, James Rosenblatt and John F. Dini
12:50 – 1:00	BREAK
1:00 – 1:40	“Minority Becomes Majority” Vighter LLC
1:45 – 2:30	“Replacing Yourself” Baker Engineering & Risk Consultants
2:30 – 3:00	Afternoon Networking



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MODERATORS



Moderator: Steven Bankler, CPA, PFS, Cr.FA, CFF, CGMA
President, Steven Bankler, CPA, Ltd.

Steven Bankler started his practice over 43 years ago. His unique firm has only CPAs working on client's book and records. The firm provides consulting, exit and tax planning for closely held/family owned businesses. They also provide litigation support in a variety of areas of business litigation. They have over 30 years in assisting buyers and sellers in the implementation of their exit plans.



Moderator: John F. Dini, CMBA, CExP, CEPA
Transition Strategies and Transaction Support, MPN, Inc.

John develops transition and succession strategies that allow business owners to exit their companies on their own schedule. He is the founding President of the Exit Planning Exchange of San Antonio. He holds a Bachelor of Science degree in Accounting from Rutgers University, an MBA from Pepperdine University, and the Certified Exit Planner and Certified Exit Planning Advisor qualifications.



Tim Geppert, CPA
CFO Advisor, Vaco

Tim provides insight and solutions for Family Businesses and Construction and Engineering Companies. These include general contractors, concrete, masonry, interior, electrical, mechanical, telecom, utility, flooring and specialty contractors. Tim was involved in international projects in Surinam, Colombia, Jamaica, Australia, United Kingdom, France, Mexico and Brazil.



Moderator: Lisa Mochel
Vice President, Treasury Management, Business Development Officer, Lone Star Capital Bank

Lisa is a Treasury Management specialist with over 30 years experience. Her responsibilities include working with commercial customers to assist them with business operations efficiencies. Lisa is also the business development specialist for Lone Star Capital Bank. Lisa is very active in the community, chairing and serving on various committees and organizations.



Moderator: James Rosenblatt
President, Rosenblatt Law Firm

James has practiced law for over 26 years since obtaining his JD from Emory School of Law. Prior to opening his firm, James gained valuable experience at Davidson & Troilo, the international law firm of Akin Gump and as in-house counsel for an international construction company. James has been recognized as one of the best attorneys in both San Antonio and nationally.



Moderator: Carolyn Smith, CPA, AEP
Chartered Advisor in Philanthropy, C3 Financial Partners

Carolyn's experience as a CPA in public accounting was the perfect prelude to working with C3 Financial Partners as a senior partner. Collaborating with a client's advisory team is key to helping a client optimize their options. She is a Chartered Advisor in Philanthropy® (CAP®), holds a Group I Life and Health License, and is a certified General Securities Representative (Series 7 and 66).

PANELISTS



Quentin A. Baker
President, Baker Engineering and Risk Consultants

Quentin holds a B.S. in Mechanical Engineering from Texas A&M University and an MBA from the University of Texas at San Antonio. He has over 40 years' experience in R&D, testing, hazards analysis, engineering projects, and accident investigation in the fields of combustion, explosions, and blast effects.



Jeremy Calvert
CEO/Majority Owner, Vighter LLC

Jeremy is service-disabled veteran who served as a Special Forces "Green Beret" Medic in the US Army with 7th Special Forces Group. Jeremy deployed throughout South America to provide tactical training to foreign military and police. He graduated with an M.A. in Homeland Security and later an M.B.A. in Global Business Management. In 2012, he joined Vighter and helped grow the business to \$16M in annual revenue.



Bjorn Dybdahl
President, Bjorn's Audio Video Home Theatre

Bjorn Dybdahl is President of Bjorn's Audio Video Home Theater, a 46 year-old business that started out providing audio and video solutions for residential customers but today has added other categories such as networking, shades, lighting and home automation. Bjorn's continues to survive during a time of major upheaval in how people purchase and live with all their electronic devices.



Kris Dybdahl
Vice President, Bjorn's Audio Video Home Theatre

Son of Bjorn Dybdahl, Kris started working in the family business while in high school and over the years worked in nearly all areas of the business, preparing him for his current position as Vice President. Kris's main role now is leading Bjorn's into the future by providing clients the most technology-forward, life-changing smart home solutions as well as the seamless installation and integration that go with it.



Kim Ford
President, The KFORD group

Kim is president of The KFORD group, a leading CPA firm in San Antonio and is a Certified Valuation Analyst and a Master Analyst in Financial Forensics, both awarded by the National Association of Certified Valuators and Analysts. She performs business valuations and forensic investigations while working closely with clients and attorneys to analyze complex financial situations and provide expert testimony in the courtroom.



Bobby Hines
Former President, Eldridge Electric

Bobby Hines and his mother, Cora Hines, purchased Eldridge Electric in 1972. Bobby, a former auditor for Texaco, now had to learn a new business from the ground up. Selling the company in 2020 proved to be a challenge due to their concern about keeping the "Eldridge Culture" intact. With much deliberation, Bobby found the company's successor locally and closed on the sale of the business in December of 2020.



Travis McLeod
President, Silber & Associates and Highland Commissioning

Travis is a graduate of Texas Tech University with a degree in Mechanical Engineering. He has 29 years of experience in the construction industry. He has experience in central plant design, health care design and laboratory design including biocontainment precautions. He spends a significant amount of time working directly with building owners and clients, solving complex construction problems.



Krysti Seibert
Director of Human Resources, Alterman, Inc.

Krysti Seibert serves as Alterman's Director of Human Resources, bringing 24 years of diverse HR experience to the team. Her areas of expertise include employee relations, HR compliance, policy and handbook development, training and development, along with benefits administration. As a true generalist, Krysti provides strategic and operational support in all areas of human resources.



Chris Thiel, CMA
Executive Vice President, CFO, Alterman, Inc.

With over 20 years of financial and administrative management experience, Mr. Thiel is responsible for the development of business policies, benefit review and management, and administrative management and provides overall direction for financial operations, risk management, contract administration, purchasing and human resources. He also serves on Alterman's Board of Directors and is the Secretary and Treasurer.



JAMES ROSENBLATT
President
Rosenblatt Law Firm

WHY EXIT PLAN?

While exit planning is timely at any point during the life of a business; however, the earlier one begins the process, the better the outcome. When creating a successful exit plan, consider including the following key items:

1. **ENTITY STRUCTURE.** Question whether your entity structure provides flexibility and tax reduction during an exit. While entity structures may be modified, reorganization costs increase during the lifetime of a business. Starting with the correct entity structure from the beginning can decrease costs, add flexibility, and reduce tax consequences.
2. **MANAGEMENT.** Ensure your business maintains the correct management team to either purchase the business or assist a new owner to continue the business. Unless a buyer is looking to fold the business into an existing business, a strong management team is key to a successful transfer.
3. **IP PROTECTION.** Protection of intellectual property provides a key intangible asset that can increase the purchase price for a business. Protections like trademarks and non-compete agreements increase a company's value and provide an advantage that cannot be easily replicated.

While these are just a few of the items to be considered in developing an exit planning strategy, considering your options and executing the same from the beginning of a new business will help maximize the value of your business and ensure a successful exit.



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XPX ISN'T FOR EVERYONE. IT'S FOR THOSE WHO SHARE OUR COLLABORATIVE, LONG-TERM MINDSET.

Our members are not just individual accountants, attorneys, wealth planners, investors, or exit planners; they're a collaboration of experienced, proven professional advisors who know they can accomplish more for their businesses, their private company clients – and the entire community – when they collaborate together.

Membership in XPX is only for those who:

- Understand the vital role that established private companies play in helping building our local communities.
- Are focused on building relationships versus conducting transactions.
- See the big picture. They know that they can better serve their clients by having access to a trusted community of professional advisors who can help build business value, manage succession, and build owner legacy.
- Represent one of our 12 Advisor Professions (Accountants, Attorneys, Bankers, Coaches, Consultants, Insurance Providers, Investors, M&A Intermediaries, Non-profits, Valuators, Virtual Managers, Wealth Planners).
- Uphold the highest standards of professional integrity.
- See the value of having an open network to ensure there is no single approach or solutions provider to assisting private company owners.
- Know the business environment is always changing and need to keep abreast of the latest information to meet their clients demand.
- Are sponsored by existing XPX members.
- Adhere to our Five Core Advisor Principles (Work Collaboratively, Put The Client first, Think Long Term, Consider The Human Angle, & Always Be Learning).

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FAMILY BUSINESS SUCCESSION & YOUR MONEY

There is only one certainty for business owners: You won't be able to stay at the helm forever. You'll exit, either by choice or by circumstance. Some business owners prepare years in advance for that day, but family business owners don't often have such a clear vision in place.

Overlooking a smart exit plan can lead to high taxes (sometimes 40% of the sale—yes, even to heirs) or worse: a sudden dissolving of the business they worked so hard to build. Here are four ways to change that potential outcome for a family business:

GET PLANNING.

The most recent PwC Family Business Survey found that families who run businesses together have fallen woefully behind on having important strategic documents in place. Only 47% have a shareholder's agreement, 19% have emergency and contingency procedures, and 18% have entry and exit provisions. Don't forget the "business" part of the family business. Have a smart exit strategy that includes the plans above and other tools like a buyout agreement.



SEPARATE BUSINESS FROM PERSONAL.

Do you know how interconnected the business and personal assets are? Find out. Too many family business structures don't provide optimal asset protection between the company and the family. A good structure can also establish order and governance, which can, in turn, cut down on family disputes over business decisions.

HAVE A GOOD SALES STRATEGY.

Remember that business owners can owe more than 40% in taxes above the total amount paid for the sale of their business. Avoid this by understanding the difference between capital gains and ordinary income. A sale price that looks better than another on paper may end up hitting the wallet harder come tax time. And if you think you can avoid a tax bill by gifting the business to heirs instead of selling, think again. That decision could cost you both dearly.

STAY AHEAD OF CHANGING TAX LAWS.

Capital gains, estate, and other taxes are changing under the Biden administration. Each of these tweaks could result in thousands more in taxes if you don't plan accordingly. If ever there was a time to evaluate an exit plan, business structure, and estate plan, it's now. Few plans that made sense over the past four years will still make sense by 2022.

Passing a business down to the next generation is easier said than done. For the business to survive the transfer, be mindful of the costs and plan ahead. The next generation will thank you.

Steven Bankler has more than 44 years of experience in the accounting industry. Steven's expertise lies in consulting, planning, tax, and asset protection as well as exit strategy services for closely held businesses. He also provides litigation support (both as a testifying expert witness and a consulting expert), business negotiations and estate planning. Learn more about Steven Bankler, CPA, Ltd. at www.bankler.com



Your Compensation Strategies will impact the transferable value of your company.

Every company's value and growth path is driven by the performance of its team. Whether you're planning a sale to a third party or an internal transition to family or key employees, the stability and skills of your successors will determine the proceeds and timing of your exit. The **5Rs Compensation Matrix™** — Recruit, Retain, Reward, Restore, Retire — can help you pinpoint problems related to compensation and your total compensation strategy. How does your strategy compare to others in your industry? Let's find out.



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John Dini
CMBA, CExP, CEPA
President, MPN Inc.

THE IMPORTANCE OF DEFINING YOUR PERSONAL VISION

According to a survey by the Exit Planning Institute, over 70% of former business owners are unhappy with the result of their exit one year after transition. This figure has been cited by Forbes and the Washington Post, and appears on dozens of Exit Planning professionals' websites. I know of no other industry that publicizes its failure rate so energetically. What would we say about a teacher who had seven out of ten students fail? Or a surgeon who lost over two-thirds of all his patients?

I recently saw a conference speaker attribute that figure to "Not getting enough money." In my experience, nothing could be further from the truth. Having worked with business owners for 30 years, I think the answer is plain. The unhappy outcomes are largely because the client didn't really know what the next phase of his or her life was going to be like.

Most professionals in the exit planning world come from a technical background. They are experts in taxation, the legalities of transactions, risk management with insurance instruments, valuation, financial structuring or estate planning. Most only discuss life after the business perfunctorily. "What will you do after you sell?" They ask. The client says, "I'm going to play a lot of golf," and the advisor checks off a box. The vision for the future is completed. Never mind the fact that playing 36 holes a day for five days a week isn't much of a plan.

That's what it would take. We like to engage in an exercise with our clients. We take their average work week (say, 50 hours) and ask them to fill it with post-exit activities.

A round of golf every Monday, Wednesday and Friday? That's about 12 hours a week. A 2-week travel vacation every three months? That equates to about ten hours a week. Workout every morning? Five more hours. Most owners are stumped to identify activities after that, and they have only covered half their active work time. Add in evenings and weekends, and you have a recipe for boredom, and a bored entrepreneur is an unhappy entrepreneur.

Entrepreneurs are always looking forward. They have little time or interest in reviewing past successes or mistakes. Ask the average business owner to name the best improvement he or she made three years ago, and you are likely to get a blank stare. Ask them to discuss their plans for next year, and you may be listening for a while.

A business owner is much more likely to exit happily when there is something ahead that he or she wants to do more than running the business. When exit planning advisors focus on the technical aspects of a transition, they are shortchanging their clients. A personal vision of life after the business is the single most important factor for successfully negotiating the next phase of their lives.



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When selling, restructuring, or reorganizing your business, there are several things that can have negative effects on the overall valuation of your business. Our panel of experts will provide some insights into what they've seen in their experiences and how to avoid these issues. You'll also hear best practices on what to do if the unthinkable has already happened and how you can recoup some of the lost value in these situations. To learn more about our panelists, check out page 7B which contains the bios of all of our moderators and speakers. This panel will consist of:



KIMBERLY FORD

Kimberly C. Ford is president of theKFORDgroup, a leading CPA firm. She has served as a leader in the field of taxation for more than 30 years. Her areas of experience include tax, accounting, financial and estate planning. She provides direct financial counsel to business owners across South Texas, assisting them in making crucial decisions for success.



CAROLYN SMITH

Carolyn Smith came to C3 Financial Partners as a CPA with 30 years of public accounting experience focused in the areas of estate, continuity, and post mortem planning. By working collaboratively with her clients' advisory teams, the challenging planning process is accelerated. This also helps to ensure that families and their businesses meet their personal and financial objectives.



JAMES ROSENBLATT

James Rosenblatt has practiced law for over twenty-six years since obtaining his JD from Emory School of Law. Prior to opening his own firm, James gained valuable experience working at the regional law firm of Davidson & Troilo, the international law firm of Akin Gump and as in-house counsel for an international construction company.



JOHN F. DINI

John develops transition and succession strategies that allow business owners to exit their companies on their own schedule. He is the founding President of the Exit Planning Exchange of San Antonio. He holds a Bachelor of Science degree in Accounting from Rutgers University, an MBA from Pepperdine University, and the Certified Exit Planner and Certified Exit Planning Advisor qualifications.

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Sponsorship gets you in front of our network through face-to face programming, email lists and our robust online presence. We welcome inquiries from new sponsors. Visit us online or contact us for more information.

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Comprehensive exit, succession or transition planning requires a team of professionals. The legal, taxation, employee, financial and personal issues involved should be coordinated to arrive at the owner's objective.

XPX-San Antonio was formed in May of 2017, and hosted its first Chapter meeting in September of that year. The majority of meetings are focused on sharing professional knowledge.

Each business advisor is more capable when he or she understands the impact of their work on the others.

Do you advise business owners?

XPX-San Antonio is a different kind of professional organization. Our events are designed to foster education *between* professions. We don't focus on a single advisory skill, but rather on the clients we serve, business owners.

Applicants for membership must be either working with business owners directly, or part of a firm that does such work. Applicants must include two professional references, one of whom must be a current XPX member. Dues for advisors are \$300 annually. Qualified advisors are invited to contact anyone on our membership committee.

Visit us online for additional information and resources.
exitplanningexchange.com/san-antonio

THE EXIT PLANNING EXCHANGE IS A COMMUNITY OF PROFESSIONAL ADVISORS WHO WORK COLLABORATIVELY TO HELP OWNERS BUILD VALUABLE BUSINESSES AND ASSIST THEM IN PREPARING AND EXECUTING A SUCCESSFUL TRANSITION.

