



## Media Release

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The Exit Planning Institute, Wisconsin Chapter Holds 2022 Owners Forum on November 3, 2022

Milwaukee, Wis. and Madison, Wis. – October 3, 2022 – The Wisconsin Chapter of The Exit Planning Institute (EPI) is holding its 2022 Owners Forum on November 3, 2022, at Westmoor Country Club, Brookfield, Wis. This year’s Forum is “Bringing It All Together to Maximize Your Greatest Asset, Your Business.”

The Forum will provide business owners with a look at the future – where the business has the potential to go, and how business owners may maximize the value of their greatest personal asset – their business. The event is for business owners; however, advisors are welcome with a business owner guest.

Erik Owen, president of EPI Wisconsin, and president and founder of Oak Hill Business Partners, said, “We are excited to host another Owner’s Forum to help educate owners on their options for exiting their business. Again this year we will have business owners sharing their journeys with the attendees as well as experts discussing the ins-and-outs of exit planning and execution. You don’t want to miss this event.”

Attendees will learn the personal journey of three business owners that have gone through the full entrepreneurial journey, including selling the company to monetize the value of their companies.

Additionally, the Forum will feature an “Ask Me Anything” panel of advisors from the Wisconsin EPI chapter. A CPA and value growth advisor, financial and insurance advisor, transactional attorney, and investment banker will field audience questions to help an owner grow, protect, and successfully transition their business asset from paper wealth to money in the bank.

Industry experts who will participate are Connie Hegerfeld, former EVP, COO Women’s International Pharmacy; Gerry Fleisher, president & CEO retired, 5 Alarm Fire and Safety Equipment; Cheryl Tesch, business development manager and insurance specialist, I.A.G. Wealth Partners, LLC; David J. Sisson, shareholder, Reinhart Boerner Van Deuren s.c.;

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Martha Sullivan, CPA, ABV, CEPA, president, Provenance Hill Consulting, LLC and consultant with The Family Business Consulting Group; and Steven G. Sprindis, co-founder and managing director, Waypointe Private Capital.

The Forum hours are 1:30 p.m. – 6:00 p.m., including a networking reception as well as drinks and appetizers. Dress is business casual. Cost is \$75. To register, go to <https://exit-planning-institute.org/events/event/epi-wisconsin-november-2022-chapter-event/>

Sponsors of the event are The Family Business Consulting Group, I.A.G. Wealth Partners, LLC, Oak Hill Business Partners, Murphy Associates, Greater Brookfield Chamber of Commerce, PNC Bank, Johnson Financial Group, Provenance Hill Consulting, LLC, Waypoint Private Capital, and Accel Advisory Group.

The Wisconsin Chapter of the Exit Planning Institute is a group of local advisors dedicated to changing the outcome for middle market owners looking to grow, transition, or exit their business. The Wisconsin Chapter is a community of professional advisors that collaborate to address the unique needs of the community.

EPI Wisconsin develops bi-monthly educational and networking programs for business owners and professional advisors to build awareness and better prepare an owner for the successful growth and exit of their business. Our chapter develops, encourages, and fosters the adoption of best practices for the exit planning profession. For more information, contact Erik Owen at 262-299-5526 or visit [www.EPIWisconsin.org](http://www.EPIWisconsin.org).

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