



Eastern Lake County  
Chamber of Commerce

# SUCCESSION PLANNING AND YOUR BUSINESS



April 23, 2024  
11:30am – 1:00pm



Grand River Cellars Winery & Restaurant  
5750 S. Madison Road (Rt 528)  
Madison, OH 44057

\$20 Members  
\$25 Non-Members  
Includes Lunch



Learn about essential considerations for business owners planning retirement or exiting their business. Topics covered: succession planning, estate planning, buy/sell arrangements, choosing a successor, valuation, succession strategies, and financial planning for retirement, investments, and insurance.

## PRESENTING SPONSORS



## MEET THE PANELISTS



*Joshua Strickland*

Partner, Dworken & Bernstein LPA



*Patrick Dulzer*

RICP, Financial Advisor,  
Western & Southern Life



*Larry Lamphier*

President, Wintergreen Associates

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