

## Exclusive Invitation

JOIN US AT THIS BREAKFAST EVENT  
EXCLUSIVE FOR NORTHERN  
ONTARIO BUSINESS OWNERS

Tuesday, Feb. 28, 2023

7:00 - 9:00 AM

Northern Water Sports Centre

206 Ramsey Lake Rd., Greater Sudbury, ON

### LEARN ABOUT

- Bridging the Profit, Quality & Wealth Gaps
- Creating an Intergenerational Legacy
- Value Gap Support & Liquidity Options
- Converting the Value You Built in Your Business into Maximum After-Tax Cash when Exiting

#### Attendees will be offered:

- Complimentary and Confidential Wealth Gap Estimate
- Complimentary and Confidential Estimate of Business Value

RSVP Now to Save Your Seat

Click to RSVP

Continental Breakfast 7:00 AM

Presentation 7:15 - 8:30 AM

Q&A Discussion 8:30 - 9:00 AM

See next page for Speakers & Bios

For more information, visit

[businessownerevents.ca](http://businessownerevents.ca)

or call Jacob Johnston at 705-822-7439

Investors Group Securities Inc.  IIROC

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# Laying the Foundation to Achieve Maximum Business Value



 PRIVATE WEALTH  
MANAGEMENT  
KILGOUR GROUP

 RIZOLVE  
PARTNERS

  
Commercial Banking

 SUNBELT  
BUSINESS BROKERS  
MERGERS & ACQUISITIONS

Avoid common pitfalls & mistakes.  
Learn what needs to be done now  
to ensure you can harvest your life's  
work at peak value.

## PANEL OF SPEAKERS



**Stephen Cummings, CPA, CA, FCA, BSc (Econ), CEPA®**  
CEO, Managing General Partner, **Rizolve Partners**

A leading advisor and financial expert who works with private Business Owners to identify and drive value. Rizolve specializes in developing transformational strategies that position businesses for exit on optimal terms. Prior to founding Rizolve Partners, Stephen was a partner or executive with leading PE & VC firms; Harlequin Enterprises; and Deloitte, London, UK. Stephen received his CERTIFIED EXIT PLANNING ADVISOR® (CEPA) designation in 2021.



**Jacob Johnston, B. Comm, MBA, CEPA®**  
Consultant, IG Wealth Management, **Kilgour Group**

Jacob is a competitive and responsive individual with a distinct focus on relationship management. He attended Cornell University and Dalhousie University to obtain a Bachelor of Commerce degree with a major in Finance. After graduation, Jacob pursued professional hockey for five years in North America and Europe, and later obtained an MBA from Edinburgh Business School. During that time, he gained a variety of experience in the finance industry, including roles in Small Business, Capital Markets and Merchant Banking, before joining IG Wealth Management.



**Richard Picard, HB Comm**  
Senior Manager Commercial Sales, **TD Commercial Banking**

Richard is an accomplished senior leader with experience in banking and private industry. Prior to joining TD, Richard was a Shareholder, President & CEO of an aviation company. He brings an entrepreneurial approach to banking and is renowned for structuring customized financing solutions to help his clients achieve their business and personal goals. Richard is an active volunteer and current Board Member of Greater Sudbury Development Corporation. He earned his H.B. Comm from Laurentian University/Université Laurentienne.



**Steve Renelli, M&AMI, CBI, CMEA**  
M&A Advisor, **Sunbelt Business Brokers / Mergers & Acquisitions**

Steve is a licensed Business Broker and Merger & Acquisition Advisor based in Sudbury, Ontario, who specializes in working with Northern Ontario-based business owners to ensure maximum value is achieved upon exiting their business through a methodical and professional business-sales process. Steve is a Merger & Acquisition Master Intermediary, a Certified Business Intermediary, and Certified Machinery & Equipment Appraiser. Steve earned his Bachelor of Commerce, Finance (Honours) from the Sprott School of Business at Carleton University. He is currently a Director of a number of Northern Ontario-based businesses and is also a Board Member of the International Business Brokers Association, Canada.