For the past three years, Rian Spencer has served as a Private Wealth Advisor/Vice President at Alliance Bernstein in Chicago. Rian has 15 years of Financial Advisory experience including at BMO Harris Bank. Rian's artistic background and experience as an educator are skills she brings to her creative problem-solving for clients facing critical financial decisions.

MODERATOR

RIAN SPENCER

Private Wealth Advisor
Vice President
Alliance Bernstein

Brennan is a CERTIFIED FINANCIAL PLANNER™ professional and an Accredited Investment Fiduciary (AIF), and his focus has and always will be putting the client's best interests first. He is an integral part of the firm's Retirement Planning Division which helps businesses develop, manage, and optimize their retirement plan strategies as well as developing strategies for business owners planning to exit their companies.

BRENNAN HOLLENBECK CFP®, AIF®

Vice President
Wealth Advisor
Mueller Financial Services

Andrew J. Kelleher, Jr., co-founder of Kelleher + Holland, LLC, had a vision of legal services deeply rooted in high-level client services from the very inception of his career. He believes that nothing replaces old-fashioned hard work; he has been putting his clients' best interests first for 25 years. His practice focuses on trust and estate law, business law, tax law, and asset protection planning for high-net-worth business owners, executives, and individuals.

ANDREW J. KELLEHER, JR.

Founding Member
Kelleher + Holland, LLC

Jim, a Certified Exit Planning Advisor (CEPA), joined AMP Valuation in early 2023 where he now works with a tight-knit team to prepare business valuations for small-medium sized businesses. He also has served internally at a family run business where he is responsible for A/R, A/P, recording sales, bank reconciliations, customer service, working with a team to make and implement capital purchases, and preparing financial statements for owners and tax preparers.

JIM MULCAHY CEPA

Analyst
AMP Business Consulting, LLC

mbbi MIDWEST BUSINESS BROKERS AND INTERMEDIARIES

EXIT PLANNING: ASSEMBLING THE RIGHT TEAM AHEAD OF A SALE

MAY 23, 2024

5:00 PM - 7:00 PM

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