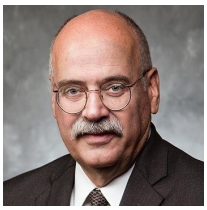
Small Business Development Center
UNIVERSITY OF GEORGIA

Kennesaw State University
Coles College of Business

SUCCESSION PLANNING: PREPPING A BUSINESS FOR ENDGAME SUCCESS SPEAKERS



Dave Chambless, President, Abraxas Business Services. His extensive business experience, from leadership roles in sales, business development, and international operations, to CFO for both a publicly-traded company and an early-stage technology venture, provides a deep understanding of the opportunities, and the challenges, business owners face on a daily basis. He co-founded Abraxas in 2003 with the intent of helping small business owners gain appropriate value when it is time to exit their businesses. Relying on Abraxas' proven methodologies and experienced team, Chambless has guided dozen of business owners in transactions to successful conclusions at the Closing Table.

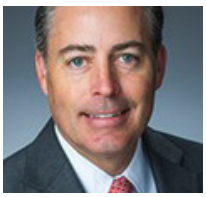
With more than 35 years of accounting experience, **Chris Clayton, Engagement Partner, Carr, Riggs & Ingram LLC** provides clients with accounting and consulting services, as well as insight into business planning, operations, and exit strategies. Working primarily with closely held businesses, he helps design sophisticated tax and business plans that build short- and long-term strength. He also works with larger and publicly held corporations on special projects and assists many high-net-worth individuals, helping them structure their assets in a way that minimizes their tax burdens and maximizes and protects their wealth.

John Coffin, President, Practical Growth Advisors has spent his 30+ year career advising companies on growth and transition issues. John co-founded Practical Growth Advisors (PGA) in 2018. PGA is a consulting and advisory firm focused on serving privately held companies and helping them grow faster with confidence. Prior to founding PGA, John was the Co-Founder and Executive Vice President of Atlantic Capital Bank. He oversaw the Bank's Regional Corporate Banking, Financial Institutions and Capital Markets divisions. Prior to co-founding Atlantic Capital Bank, John spent ten years at Wachovia Bank with leadership positions in the capital markets, commercial and corporate banking divisions.

Will Connell, **Principal, Abraxas Business Services** has worked across a variety of industries as an entrepreneur, business owner, and advisor. Connell has experience as both principal and advisor in multiple sell-side and buy-side transactions. He has advised business owners through all the phases of a business lifecycle. Connell has also successfully raised startup capital for a new venture, turned around a distressed $20-mm revenue company in the building materials space, and sold three businesses to strategic acquirers.

For more than 25 years, **Deborah Cox, Principal, Abraxas Business Services** has helped business owners in both publicly-held, privately-owned, and family-office enterprises grow their businesses for successful exits. Having held management positions in Finance, Investor Relations, Corporate Communications, and Marketing, Deborah's broad understanding of business processes, as well as equity research and M&A experience, are valuable assets for getting Abraxas clients to the Closing Table.

Kim Hoipkemier, Esq. is the leading partner for the estate planning and probate team at Hoffman & Associates. Kim's primary areas of practice include both estate planning and probate for high net-worth clients. She is keenly focused on helping client's minimize the effect of the estate tax, protect valuable assets and preserve estates for future generations. Kim's compassionate demeanor is also key in helping families settle estates for their loved ones. Kim has been with the firm since 2011 and is a Cum Laude graduate from the University of Georgia's School of Law.



Chris Rezek, Managing Director, J.P. Morgan Securities is a CERTIFIED FINANCIAL PLANNER™ with 20 years of private wealth management experience. He provides comprehensive investment planning and asset allocation advice to high-net-worth individuals, and business owners. Chris works with clients on both sides of their balance sheet by fully leveraging J.P. Morgan's investment platform, lending capabilities and private banking services.

Mike Sullivan is a Partner in the Corporate and Business Practice Group of the 160 lawyer Taylor English law firm in Atlanta. Mike's principal areas of law practice include general corporate, commercial and business matters, family-business law, financial matters, and mergers and acquisitions. His clients are in diverse industries---manufacturing, logistics and distribution, technology and professional services, to name a few. Mike works with CPAs and tax experts to advise clients on the most effective legal structure for their companies, and other tax and accounting matters. He also advises and represents clients in buying companies, and selling their own company.