



## COUNCIL NEWS

September 2015

Second Mailing

# President's Message

I would like to warmly welcome all of our returning members and I hope everyone had an enjoyable summer. College and professional football is under way and this morning I noticed that fall is fast approaching. For those of us that live in the bay area fall is a very glorious time. We are blessed with moderately warm days and fog free evenings.

I hope you will join us on the 28<sup>th</sup> to hear the dynamic presentation from Bill Mandel speak on business succession planning for founders and senior partners.

Please note that the date was moved to September 28<sup>th</sup> to accommodate a late Labor Day and other conflicts in Scott's schedule.

If you have not already done so, please renew your membership and make any necessary changes to your member profile. The deadline is today, September 15th. If you have already renewed your membership, thank you.

Please remember to consider inviting a guest to any of our meetings. Our membership continues to grow as a result of our members who are proactive in inviting guests, so please do invite individuals that you feel might be a good fit for our group. If you have any questions regarding membership, please contact Erin McGlynn, our current membership director, [erin.mcglynn@cancer.org](mailto:erin.mcglynn@cancer.org).

We are in need of wine sponsors October -May meetings. If you are interested in becoming a wine sponsor for any of these meetings you can do so in the registration link below.

I look forward to a season of exciting meetings and to seeing all of you on the 28<sup>th</sup>.

Respectfully,

**Joy Soulier**  
President

## Meeting Speaker and Topic

**Bill Mandel, Fox Rothchild, LLP**  
**Business Succession Planning for Founders and Senior Partners**

As the baby boomer founders, owners, partners and shareholders of professional services firms begin reaching the point of retirement, they face many questions. Fox Partner Bill Mandel will discuss how to help founders and senior partners frame the questions they should consider prior to undertaking a transition in the ownership of their business, including:

- What paths are available for the firm to continue on post-founder(s)?

- What is the value of the firm and what factors can (and should) be considered?
- Does the type of transition have implications for the valuation of the firm?
- How to develop an owners' compensation program that satisfies founders and new owners

Bill Mandel is a partner in the Corporate Department and Co-Chair of the Succession Planning Group of Fox Rothschild LLP.

Considered by his clients as a go-to source for strategic counsel regarding transition planning, Bill has helped more than 100 firms develop successful and sustaining ownership transition programs fostering the growth of firms over multiple generations of ownership and leadership.

## Meeting Date

**Monday, September 28, 2015**  
**6:00 PM Wine Reception, 6:30 PM Dinner Meeting**

Scott's Seafood Restaurant, Jack London Square  
2 Broadway, Oakland, CA 94607

*CHAR-BROILED DOUBLE CUT PORK CHOP w/Sauteed Baby Spinach and Garlic Mashed Potatoes*  
*OR*

*PASTA PRIMAVERA w/Julienned Vegetables, Sundried Tomatoes, Garlic & Grana Cheese*



## Admin Tip!

**Make sure your profile is up to date for the new EBEPD Directory**

Your contact information will appear in the new EBEPD member directory EXACTLY as you enter it in your online profile.

Now is the time to update your email, phone, company or title information. After September 15th, it's too late to have your information printed.

# Thank your to our Sponsors!

## Meeting Sponsor

Kimberly Mills



## Wine Sponsor

Karen Mudd



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