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MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: March 16, 2017

Place: Portland Country Club

Time: 4:00 PM Reception / 4:30 PM Program

Panel Discussion: Business Transitions

Please join the MEPC for a moderated panel discussion on business transition. For business owners, estate planning and transition planning are closely entwined. And as members of the MEPC, these are topics we frequently address with our best clients. At the same time, we are all aware of countless examples of suboptimal outcomes. Businesses typically comprise over 80% of an owner's wealth. As a result, proper transition planning can have a profound impact on their enduring legacy as well as the ongoing value of their business. Said differently, good planning is good business. On Thursday, March 16, the MEPC will present a panel on transition planning with three experts who devote themselves to helping owners execute plans that allow them to live their legacy.

Our Panel:

Jeff Bell CLU, ChFC Northeast Brokerage

Jeff specializes in Estate planning, Business Continuation, and Wealth Transfer Strategies. Jeff works with clients and their advisors to create and fund estate plans, establish and fund asset transfer strategies, and provide for business continuation. This entails life insurance and/or disability insurance planning for both individuals and businesses. Jeff has worked with clients with a range of assets and unique planning challenges including ultra-high net worth individuals, professional athletes, and family offices.

David Jean CPA, CCIFP, CExP

Albin, Randall, Bennett
Altus Exit Strategies

David Jean is a Principal at Albin, Randall & Bennett, CPAs (ARB) and serves as the Director of Altus Exit Strategies, LLC, a wholly-owned

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subsidiary of ARB. David graduated with High Distinction and holds a Bachelor of Science in Business Administration from the University of Maine at Orono. He has over 25 years of experience in financial accounting and consulting primarily for construction, manufacturing and real estate development companies and is an industry leader in business advisory and exit planning services. David is an expert in identifying exit planning objectives, upholding business continuity, and planning for personal wealth and estate. David is well published and has developed and taught seminars on various tax and financial management issues including The Seven Step Exit Planning Process™ and the development of customized road maps for successful exit planning. David is an active community and industry service leader and is a member of the American Institute of Certified Public Accountants, Associated General Contractors of Maine, Associated Builders and Contractors of Maine and New Hampshire, the Construction Financial Management Association, the CPA Advisory Council of the National Association of Surety Bond Producers, and the Manufacturers' Association of Maine. He currently serves on the board of directors for Maine Associated Builders and Constructors and Harpswell Coastal Academy.

Steven Tenney

Certified Exit Planning Advisor
Certified Portfolio Manager
Senior Vice President
UBS Wealth Management

Running a family business is filled with rewards and challenges. Steve experienced this firsthand when he merged his wealth management practice with his father's in 1997. Combining respect for the core values passed down from his father with a recognition of the importance to proactively evolve, Steve works hard to solve problems and provide solutions for clients, ultimately making a meaningful difference in their lives.

As a Certified Portfolio Manager and a Senior Portfolio Manager in our Portfolio Management Program, plus a veteran of the Firm since 1993, Steve is responsible for directing the team's investment strategy. Prior to joining UBS Financial Services Inc., he was a securities lending representative at State Street Bank and a research assistant at Morgan Stanley Asset Management in London. Steve graduated from Tufts University and currently lives

in Yarmouth with his wife and two children. Outside of work he spends time volunteering and competing in numerous sports including sailing, rowing and triathlon.