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Industry experts team up to present a comprehensive workshop on Buying and Selling a Business

Hosted by the Michigan Association of Certified Public Accountants, the four-hour workshop on June 13th, will examine the vital roles played by CPA's, attorneys and investment bankers in helping their clients navigate a successful transaction process.

"This seminar will help illuminate the core objectives of M&A and the values and demands of a transaction. We strive to be an advocate for the business owner and their team. – what we do complements the investment banker and supports the legal side while keeping the client advised of potential tax risks and evaluating critical components of the deal. I am looking forward to sharing our ideas and best practices in this innovative seminar," states Mike Lorenz, Partner at Cohen & Company.

"It is critical when advising a client in an M&A transaction that the accounting, financial and legal advisors work in a team-based manner in order to optimize the outcome for the client. I am excited to share my experiences working on key aspects of business transactions, including purchase price adjustments, representations and warranties, and indemnity provisions. I am honored to participate in this panel with colleagues I know, trust and respect, and I think the audience will benefit from that shared expertise," says Kevin Block, Kerr Russell member (M&A, business and corporate law, finance).

"With any type of deal, it is essential to be prepared during the deliberations and exploration phase in order to ensure you are going above and beyond in the service of your client," states Christopher Mocerri, partner at Jaffe Raitt Heuer & Weiss. "This seminar will discuss a number of strategies that you should employ to help drive value before your client enters the negotiation phase of the deal."

According to Mike Brown, Partner and Managing Director, Charter Capital Partners, "Pre-marketing preparation is the key to executing a successful transaction, and we'll explore those elements in this workshop. Sell-side due, diligence, for example, is just one way that sellers can identify and potentially mitigate risks well in advance, ensuring the likelihood of a smooth transaction."

"This workshop will present a holistic look into the M&A process from planning to exit", says Gary N. Lewis, Managing Director at Cascade Partners. "This is a great opportunity for CPA's and their clients to benefit from the insights and deep transactional expertise represented on this panel."

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