# BUSINESS OWNER STRATEGY SUMMIT

**Thursday, March 5, 2026**

11:30AM to 4:00PM EST | Cocktail Hour to Follow
At Group Management Services | Richfield, OH

RSVP TODAY

**Join M&A experts for an engaging, hands-on experience designed to help you confidently plan your full or partial business exit.**

Register Here

- Estimate your business's value and **what drives today's valuations**.
- Explore **payroll and human resources** considerations during ownership transfer.
- Understand **current tax rules**, how they affect your payout, and how to minimize the impact.
- Create a clear exit plan and **build the right M&A team** for a successful sale.
- Attend and unlock your exclusive **Digital Succession Planning Checklist** to help you secure your business legacy.

**Reserve your seat as space is limited:**
**DWT Wealth: 330-564-1700**
**acameron@dwtwealth.com**

PRESENTED BY:

& DWT Wealth

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Group Management Services
3750 Timberlake Dr., Richfield, OH 44286

BUSINESS OWNER
STRATEGY SUMMIT

# ITINERARY

THURSDAY
MARCH 5, 2026
11:30AM - 4:00PM EST

## 11:30 AM

### REGISTRATION & LUNCH

## 12:00 PM

### WELCOME REMARKS

Matthew G. Wracher, AIF®, CEPA®
*Managing Partner and Senior Financial Advisor at DWT Wealth*

## 12:15 PM

**Financial Planning: Assembling a Team That Builds Wealth**
David L. Archer, II, CFP®, CEPA®
*Vice President and Senior Financial Advisor at DWT Wealth*

## 12:30 PM

**Payroll & HR for Business Transitions**
Stacey Larotonda
*Chief Customer Officer at Group Management Services*

## 1:00 PM

**Mergers & Acquisitions**
Christopher P. Reuscher
*Partner at WH Burkley*

OneSeven is a registered investment adviser with the U.S. Securities and Exchange Commission (SEC). Registration with the SEC does not imply a certain level of skill or training. All titles listed for individuals associated with DWT Wealth represent the individual's role with DWT Wealth, and not their role with OneSeven. Services are provided under the name DWT Wealth, a DBA of OneSeven.

## 1:30 PM

**Investment Banking**
Al Melchiorre, CM&AA
*President & CEO at MelCap Partners*

Anthony Melchiorre, CEPA®
Managing *Director & Principal at MelCap Partners*

## 2:00 PM

**Taxes for Business Succession**
Thomas W. Krause, CPA
*Director at Corrigan Krause*

## 2:30 PM

**Business Valuation**
David C. Orth
*Managing Partner at WR Valuation*

## 3:00 PM

### COFFEE & SNACK BREAK

**1031 Capabilities: Optimizing Your Corporate Real Estate**
Nathan W. Cope, AIF®, CEPA®
*Vice President and Senior Financial Advisor at DWT Wealth*

## 3:15 PM

### SUCCESSION STRATEGIES PANEL AND Q&A

*The Anatomy of a Perfect Exit*

## 4:00 PM

### COCKTAIL HOUR