

Project Title: Business Owner Solutions Rebrand	Date: 05/22/19
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Audio Script

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Wealth Management for Business Owners

Hello. I'm Karen Reynold Sharkey.

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Karen Reynolds Sharkey
National Business Owner Strategy Executive

I myself grew up in an entrepreneur family and have always enjoyed seeing the decisions that have been made by entrepreneurs to grow their business to be successful over time.

Many business owners think about their family and their company as one. We also approach business owners in the same singular lens of thinking through their personal life and through our partners at Bank of America Merrill Lynch who bring in specialists to help to achieve their commercial goals also.

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Startup

We work with clients from startup to growing their business,

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Business Growth

helping them with succession and estate planning

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Succession and Estate Planning

To the sale of their business,

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Sale of Business

and post exit.

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Post Exit

For many business owners, the decision as far as how to transition the company is going to be one of the biggest decisions of their life.

Disclosure:

Opinions are those of the featured participants and may differ from those of Bank of America Corporation and its affiliates. The information presented is for discussion purposes only and is not intended to serve as a recommendation and does not constitute investment advice.

And to help get you prepared to sell your business, we have specialists that can help you think through on the business side...

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Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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...what are the drivers of your business to help to maximize the value of your business, and also we have wealth strategists that will help you think through on the family side, how to set up different structures to potentially minimize taxes.

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We enjoy working with business owners and being able to help you along that journey, so you can focus on what's most important to you.

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Bank of America Private Bank logo

