

MOVING UP OR MOVING ON?

The 5 Questions Every Business Owner Should Consider

Whether you are growing your business, downsizing, bringing on a new partner, or selling, you are sensing obstacles that lay ahead—and anticipation and excitement is turning to fear and apprehension. Having a solid plan for any transition will prepare you for the best possible outcome with enhanced business value, steer you clear of the rumor mill, and provide a rewarding, rather than overwhelming, experience. Our panel has the depth and breadth of knowledge and experience to guide audience members towards a seamless transition.

Do you:

- show clean financial records and boast 3 years of profit?
- have systems and processes which support the business running smoothly without you?
- know if you are on a solid legal foundation to avoid unforeseen snags during the transition?

WHOM WE HELP

From Fortune 500s to private business, 100K to 500M valuations, this panel has accumulated over 130 years worth of experience in helping any kind of business successfully plan their transition.

TESTIMONIAL

"Doreen took the time to ask me the right questions until she understood how my business worked and what the dynamics were between my employees and me. She then gave me plenty of direction on how to move my business where I wanted it to go. I was a bit resistant at first and not sure if I could do what she asked of me, but I decided to put my trust in her and go for it. The results where that I was able to take my business where it had never gone before, where I had always wanted it to go. We hit record sales numbers about a month after I started coaching with Doreen. It was one of the best investments I've ever made in my business."

—Damon Cart

Licensed Insurance Agent



Vincent Montenegro
CFP®, Financial Advisor



Benny Kirksey
Business Broker



Doreen Milano CPC
Business Coach



Billy Jones
Business Attorney

*The 5 Questions
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WE ARE AVAILABLE TO PRESENT TO YOUR BUSINESS GROUP WITH VALUE-RICH CONTENT AND EXPERIENCE

BOOK US NOW

VINCENT MONTENEGRO

Vincent graduated from the University of Kansas with a Bachelor of Science in Business Administration. After pursuing other career options, in 2008 Vincent followed his passion into the financial services, joining Waddell & Reed in 2010. In 2014 he became a CERTIFIED FINANCIAL PLANNER™ professional.

With a sincere desire for helping people and passion for financial planning, Vincent helps his clients pursue their financial goals. His endeavor is to use his experience, creativity and knowledge to find unique solutions to his clients' problems.



Vincent is active in his community, serving on the Board of Directors for the Farmers Branch Chamber of Commerce and is also active in several other community organizations. He enjoys spending his free time with sports, fishing, golfing and traveling. Vincent and his wife, Sandy, reside in Farmers Branch, TX.

Vincent is licensed in Life and Health Insurance and holds the 66 and 7 securities registrations.

Vincent offers securities and investment advisory services through Waddell & Reed Inc. Waddell & Reed is not affiliated with and does not endorse any products or services by the other panel members listed. Waddell & Reed does not provide tax or legal advice and the testimonial is specific to Doreen Milano and does not pertain to Vincent or Waddell & Reed.

BILLY JONES

Billy Jones is an attorney who has advised individuals, families and businesses for over 40 years. His practice is limited to estate planning and probate, the establishment of asset protection structures and the creation and operation of succession planning for family businesses.

While his work includes business entity formation as well as the creation and modification of Trusts for tax, asset protection and legacy purposes, the most enjoyable part of his practice is what he calls "Estate Planning for Normal People". In this area of practice, he uses the "Seven Essential Documents" to protect individuals and families from the ravages of incapacity, intestacy, uncertainty, disagreement and discord.



Billy attended both undergraduate and law school at Baylor University and is a member of the Pro-Bono College of the State Bar of Texas, recognizing commitment to providing legal services to the underprivileged and a member of the State Bar College for Excellence in continuing legal education.

BENNY KIRKSEY

Benny graduated from Texas Tech University with a Bachelor of Business Administration degree. He completed the Southwestern Graduate School of Banking (SWGSB) at Southern Methodist University and ABA National Commercial Lending School.

An acquisition specialist, Benny is an expert in selling businesses. With strengths gained over 22 years in the financial services and commercial banking sector Benny has closed hundreds of business transactions including acquisitions financial analysis and development.



Benny's clients learn ideas they had not considered previously and that make a difference in the profitability encountered in the daily routines of clients and operations, as well as upon the sale of those businesses.

In Grapevine TX Benny is a small-business owner and is active in Grapevine AMBUCS— dedicated to creating independence and opportunities for people with disabilities.

DOREEN MILANO

While other kids were practicing piano or playing sports after school, Doreen was working in her father's business and loving it. Her great grandmother, grandmother and grandfather, and father all had their own businesses while she was growing up which taught her valuable lessons about family run businesses, and the importance of understanding roles and responsibilities.

Doreen has experienced the corporate world as CEO, CFO and Controller in organizations of all sizes. She worked for small businesses, then moved into the Fortune 100 business class. Her niche was transforming groups of employees into cohesive teams, and making teams and divisions profitable.



By 2010 Doreen's entrepreneurial roots finally got the better of her and she founded Visions to Excellence. As a certified professional coach she helps businesses both large and small thrive even through the most challenging economic scenarios.