



In partnership with the CWRU
Weatherhead Center for Family Business
Glenmede Private Wealth

invites you to

Passing the Torch
*Aligning Ownership, Legacy,
and Transition Strategies*

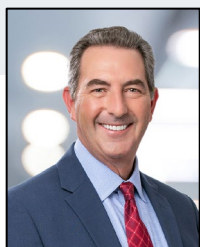
Thursday, November 13th

8:00 a.m. – 11:00 a.m.

Michael Angelo's Winery
5515 Broadview Road in Richfield

**Gather with Glenmede and the Center for Family Business for
an insightful discussion answering these critical questions:**

- ❖ *How to transition ownership over time without immediately giving up control?*
- ❖ *How can families align personal values and goals with their business's long-term vision?*
- ❖ *How do current tax and legislative trends influence succession planning and transfer of ownership strategies?*
- ❖ *What are effective strategies for equitably distributing wealth among family members when only some are active in the business?*



Mark Parthemer, JD, AEP, ACTEC Fellow
Chief Wealth Strategist,
Glenmede



Mary-Noelle Rasi
Wealth Planner, Managing Director,
Glenmede



Jennifer Marriott
Chief Executive Officer
Redmond Waltz Electric

8:00 a.m. – 8:30 a.m.

**Mimosas & Mingling
Breakfast Buffet**

8:30 a.m. – 10:00 a.m.

Presentation

10:00 a.m. – 11:00 a.m.

Private Winery Tour

**Kindly RSVP by Friday, November 7
to jack.casler@glenmede.com**