

Wells Fargo Advisors

Business Owner Luncheon

Tuesday, September 10, 2024 • 11:30 AM - 1:00 PM

An exit strategy is an important consideration for business owners, but often overlooked until significant changes are necessary. Join us for a luncheon with fellow business owners and our industry colleagues. Learn about creating a successful exit plan for your business. Guests are welcome.

Sugar Creek Country Club

Tuesday, September 10, 2024 • 11:30 AM - 1:00 PM

420 Sugar Creek Blvd

Sugar Land, TX 77478

Lunch will be served.

RSVP to **Angela Lord** by **Thursday, September 05, 2024** at **281-340-8840** or

angela.lord@wellsfargoadvisors.com.

Guest speakers

Marc Danile, Senior Vice President

John Hancock

Jeremy Miller, Business Owner Advisory Strategist, Senior Vice President

Wells Fargo Wealth and Investment Management

Sugar Creek Wealth Management Group of Wells Fargo Advisors

Marco Lloyd, CFP®

Senior Vice President - Branch Manager

Senior PIM Portfolio Manager

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CA Insurance # 0D94451

This seminar is supported and financially sponsored by John Hancock.

The opinions of any of our guest speakers are their own and do not necessarily reflect the opinions of Wells Fargo Advisors.

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