XPX Tri-State Post Election Deep Dive

November 17, 2020
4:00 PM - 6:00 PM

Meet our Panel:

Introduction:

Ramsey W. Goodrich, Managing Partner - Carter Morse & Goodrich

Ramsey W. Goodrich is a Managing Partner at Carter Morse & Goodrich and brings more than 25 years of experience advising business owners of privately held middle market companies on M&A and capital transactions. Over the course of his career, Mr. Goodrich has advised on more than 100 transactions totaling more than $3.5 billion in value.

He is an active speaker on M&A and Capital transactions, having given dozens of presentations to corporations, associations and trade organizations and is a regular speaker at industry conferences around the country. In 2019, he was awarded the Thomas Farrell Memorial Award from M&A Advisor given "to the individual chosen by their peers to have made the most generous contribution to the advancement of our industry."

Key Note Speaker:

Philip J. Lane is an associate professor of economics at Fairfield University

Phil joined the University in 1981 as one two additions to the department to substitute for the retirement of Fr. William Hohmann, S.J. His undergraduate degree is from Providence College, his masters from Northeastern University and his Ph.D. from Tufts University, all in economics. Phil was the teacher of the year at Fairfield University and inducted into ASN in 1990. He was the chair of the department for 9 years. Phil has been a faculty member and mentor in the Ignatian Residential College for 15 years as well as serving as the academic director for 6 years. For the last 16 years, he has guided the University's team in the College Fed Challenge at the Federal Reserve Bank of New York with the complete support of his department.

Michael Delgass, Managing Director – Wealthspire Advisors

Mike uses his extensive prior experience as an attorney to help his clients solve complex financial, tax, investment, and other problems. Given this background, much of his work is for other attorneys, as well as clients with family businesses, special education/special needs issues, and complex estate planning structures. Michael is a frequent author and speaker on his topics of expertise. He has been featured in numerous national media publications and has appeared as a guest on nationally syndicated radio shows. He has authored or edited treatises such as Settlement of Estates in Connecticut and Illinois Estate Planning, and articles such as "HEET Wave," "Design GRATs to Reap Court-Approved Extra Tax Savings," "Pecuniary Dynastic Offshore Trusts," and "Financial Reporting for the Family Office."

Michael T. Clear, Principal - Wiggin and Dana

Michael is the Chair of the Private Client Services Department at Wiggin and Dana. Michael regularly counsels clients on the far-reaching financial implications of estate planning. Michael's estate planning practice includes assisting individuals and families in tax-efficient and practical estate and gift planning. Michael also assists business owners with succession planning, by presenting to family groups on business/estate planning matters and by preparing business entities, shareholders' agreements, and buy-sell agreements. He often facilitates the sale or purchase of business assets. He is also a trained counselor with insight into the family dynamics these matters can effect.

Peter Diakovasilis – BDO (pending)

Tom Riggs - PKF O'CONNOR DAVIES

Thomas Riggs is a Tax Partner and Managing Director of the firm's large and diverse Financial Services tax practice. His global client base includes hedge funds, fund of funds, asset management companies, PE and VC firms, as well as their high net worth owners and principals. Tom also works within the firm's International and Family Office tax practices, while overseeing tax teams working with Opportunity Zones, Cannabis and Blockchain/Cryptocurrency. In addition to his Law and CPA licenses, Tom has held various SEC and FINRA designations over the years, including Series 3, Series 7 and Series 65.

Steven Pappas, Partner - Touchstone Advisors

Steve is Co-owner of Touchstone Advisors, a lower middle market M&A advisory firm located throughout Connecticut and New England. Steve is the President of Exit Planning Exchange (XPX) Hartford Connecticut chapter, a community of trusted advisers to privately held businesses and a member of Association for Corporate Growth (AGC) and ManufactureCT.

Steve has over 20 years of experience in managing lower middle market transactions and holds a designation as a Mergers and Acquisition Master Intermediary (M&A MI), a professional standard in middle market transactions.

Touchstone's team of seasoned merger and acquisition professionals provide business owners with the insight and deal making experience to help them prepare their business for a successful sale at maximum value.   Touchstone services all industries including manufacturing, distribution, healthcare, technology, food and beverage and B2B businesses.

Mike Richmond, Managing Director - DAK Group

Michael Richmond works directly with middle market business owners as they explore the sale of their companies consider an acquisition or implement profit improvement strategies.

Michael has successfully guided clients through mergers and acquisitions and joint ventures in a broad range of industries, providing clients with strategic advisory services and transactional proficiency. He is a skilled negotiator and works closely with his clients to obtain the maximum value for their companies.

Prior to joining The DAK Group, he held senior management positions with Bank of America, LaSalle Business Credit, Fleet Bank and NatWest. He received an MBA from New York University and his BA from Brooklyn College.

Agenda:

Introduction & Kick-off: 4:00-4:10
Ramsey Goodrich, XPX Tri-State Chairman
Managing Partner at Carter Morse & Goodrich

Economic & Business Outlook: 4:10-4:35
Key Note Speaker:
Philip J. Lane, *Fairfield University*

Breakout Session #1: 4:35-4:45

Wealth Management: 4:45-4:55
Panelist:
Michael Delgass, *Wealthspire*

Estate Taxes: 4:55-5:05
Panelist:
Michael Clear, *Wiggin Dana*

Corporate Taxes: 5:05-5:15
Panelists:

Peter Diakovasilis*, BDO*
Tom Riggs*, PKF O'D*

Breakout Session #2: *5:15-5:25*

M&A Environment: *5:25-5:40*
Panelists:
Steve Pappas*, Touchstone*
Mike Richmond*, DAK Group*

Closing Remarks: 5:50-5:45

Happy Hour & Networking: 5:45-Open