



LOWELL MORA

CEO of Impact CFO, specializes in boosting growth and profitability for small to mid-sized businesses, including family-owned and private equity firms. With expertise in equipment business models and ERP implementations, he provides strategic financial guidance to navigate complex transitions. As a Fractional CFO, Lowell ensures long-term success through cost-effective strategies and streamlined operations.



KEYNOTE TALK

ENSURING A LEGACY:

SUCCESSION PLANNING FOR FAMILY-OWNED BUSINESSES

- Ensure a smooth transition or profitable exit for your family-owned business with a well-planned succession strategy.
- Prepare in advance to avoid pitfalls and prevent business failure.
- Financial literacy is key to making informed decisions and maintaining business stability.
- Leverage debt and borrowing effectively to unlock your business's potential while minimizing risks.

OTHER TOPICS INCLUDE:

What Every Small Business Owner Needs to Know: Understanding Your Financial & Cashflow
Unlocking Value: How to Accurately Assess the Worth of Your Family Business
Mastering the 13-Week Cash Flow: Your Blueprint for Financial Stability
Leveraging Debt Wisely: A Small Business Owner's Guide to Strategic Borrowing

“WHETHER YOU NEED INSIGHTS ON FINANCIAL PLANNING, BUSINESS OPERATIONS, OR MARKET TRENDS, LOWELL DELIVERS WITH CLARITY AND EXPERTISE



BRETT KEDZIOR
CEO, LODAN ELECTRONICS

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