

# DINNER VALUATION MEETING ROUNDTABLE

## Company Growth and Impact on Valuation and Wealth Planning

On **TUESDAY, JUNE 14, 2005**, please join the **CSCPA Business Valuation Roundtable** at the **Hawthorne Inn in Berlin**. The presenters for this evening will be **Susan M. Mangiero, AVA, CFA, FRM, Ph.D. from BVA, LLC; Jessie Gilbert, Esq. and Douglas Olin, Esq. from Cummings & Lockwood LLC**. Estimating a company's growth potential is a critical element of determining its value as well as executing an effective wealth management plan. Join us for an evening of discussion about how to forecast, analyze, and manage growth. Dr. Susan M. Mangiero, AVA, CFA, FRM, Ph.D. will talk about the DuPont method and other techniques for evaluating growth potential, along with an overview of what factors can drive or hinder growth. Attorneys Jessie Gilbert and Douglas Olin will discuss the role of projected growth as part of creating an effective succession plan for company owners and providing equity compensation for key personnel.

**Don't miss out!** Two hours of CPE credit will be provided for full attendance. **All registrations must be done in advance.** For further information, please contact Phyllis Roche, CSCPA Membership Activities Associate, via e-mail at [phyllisr@cs-cpa.org](mailto:phyllisr@cs-cpa.org) or by phone: (860) 258-4800 ext. 216, fax: (860) 258-4859.

**Networking/Cocktails: 5:30 p.m. - 6:00 p.m.**  
**Dinner: 6:00 p.m. - 6:30 p.m.      Presentation: 6:30 p.m.**

It is the policy of the Society that those attending dinner are required to send in payment with this reply form. **No reservations will be made without payment.** Restaurant guarantee requirements make it necessary for us to advise them several days in advance. Late cancellations are **NON-REFUNDABLE**.

**PLEASE RESPOND NO LATER THAN FRIDAY, JUNE 10, 2005**

**PLEASE DETACH AND RETURN WITH PAYMENT TO:**  
CSCPA, Phyllis Roche, 845 Brook Street, Building 2, Rocky Hill, CT 06067-3405  
Phone: 860-258-4800 ext.216; Fax: 860-258-4859; Email: [phyllisr@cs-cpa.org](mailto:phyllisr@cs-cpa.org)

(BVR 6/14/05: MANGIERO, GILBERT & OLIN)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Check one:

\_\_\_\_\_ **Prime Rib: \$35.00** (includes tax and tip)      \_\_\_\_\_ **Broiled Swordfish: \$38.00** (includes tax and tip)

\_\_\_\_\_ **Chicken Valencia: \$28.00** (includes tax and tip)

Check (made payable to CSCPA)

VISA       MasterCard       American Express      **Total Amount \$** \_\_\_\_\_

Company Card       Personal Card      CVV Code: \_\_\_\_\_

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