

Stakeholder Value ... Build It and Monetize It

Location:

*Boca Raton Resort and Club, a Waldorf Astoria Resort
Boca Raton, Florida*

Meeting Agenda

February 24 to 26, 2020

Monday, February 24, 2020

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| 6:00 p.m. - 7:00 p.m. | Welcome Reception – Spanish Terrace |
| 7:00 p.m. – 9:00 p.m. | Reception Buffet |
| 8:00 p.m. – | Welcome Remarks – Bob Benson, Chair, RLBenson & Associates, Inc. |
| | Participant Introductions -- Introduce you and your firm |

Tuesday, February 25, 2020

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| 7:30 a.m. – 8:15 a.m. | Breakfast – Mizner Card Terrace |
| 8:15 a.m. – 8:30 a.m. | Meeting Room – Mizner Room |
| | Delivering a world-class experience to all your stakeholders
-- Bob Benson, Chair, RLBenson & Associates |
| 8:30 a.m. – 9:15 a.m. | A Conversation with Russell S. Reynolds, Jr., Founder and Chairman, RSR Partners hosted by Bob Benson |
| 9:15 a.m. – 10:00 a.m. | First Answer the Why Question – Garland West, Executive Communications and Branding Consultant |
| 10:00 a.m. – 10:45 a.m. | Using the tools available to create a superior experience -- Ian Cameron, Principal and Founder, The Cameron Consulting Group |
| 10:45 a.m. – 11:00 a.m. | Break – |
| 11:00 a.m. – 12:30 p.m. | Establishing Financial Value, Financing Growth and Taking Ownership Beyond the Founder(s) – Rich Kurkowski, President, Kurkowski & Company |

12:30 p.m. – 1:30 p.m.	Lunch – Mizner Card Terrace
1:30 p.m. – 2:15 p.m.	Thinking about the critical issues before deciding on broadening the ownership of your firm. Key elements of an effective Shareholder's Agreement. – Brett W. Dixon, Partner, Finn, Dixon & Herling
2:15 p.m. – 3:00 p.m.	Recognizing effective value creators - Panel Discussion Discussion Leader – Ian Cameron Panelist – Bob Benson, Brett Dixon, Rich Kurkowski and Garland West
3:00 p.m. – 3:30 p.m.	Break –
3:30 p.m. – 4:30 p.m.	Involving PE in Monetization and Growth of your Firm – Dale Jones, CEO, Diversified Search Group (and Katie Bouton, Founder & CEO of Koya Partners, and President, Diversified Search Group) <ul style="list-style-type: none">• Knowing what buyers and sellers seek from a transaction• Aligning expectations with the reality during the first year
4:30 p.m. – 5:00 PM	Wrap-up Session – Bob Benson <ul style="list-style-type: none">• Q&A• Review of Wednesday's Schedule
5:00p.m.	Adjournment
7:00 p.m. – 9:00 p.m.	Poolside Networking Reception and Buffet Dinner – TBD Pool

Wednesday, February 26, 2020

7:30 a.m. – 8:15 a.m.	Breakfast – Tower
8:15 a.m. – 3:00 p.m.	Meeting level – Individual Sessions with Topic Leaders <ul style="list-style-type: none">• Ian Cameron: Bassford Room• Garland West: Tower Card Room• Rich & Mike Kurkowski: Tower Suite D• Bob Benson: Tower Suite• Brett Dixon: Vidal Room
3:00 p.m.	Program Adjournment