



PPA

June 11-13 • Avalon, NJ

Summer Leadership Conference 2023

THE GROWTH DILEMMA

June 12 from 9:00 AM – 12:00 PM

Growth plans are no longer a luxury, they are a requirement. This workshop will take attendees through a series of exercises to help define goals and build a business plan for the future. These exercises are called the Velocity Matrix and will include:

- What is your EntreType, and how it helps you find comfort with your personal path forward (think Myers Briggs for entrepreneurs)
- What is your risk tolerance, and how does it affect your decisions?
- What were the three most significant sources of your revenue in 2022? What do you want them to be next year?
- What is your organization's most significant weakness today, and how do you plan to resolve it?
- What are three good acquisition targets for you?
- Understanding the pro's and con's of different financing options and alternatives.

ABOUT OUR PRESENTER

Ami Kassar, founder and CEO of MultiFunding and author of The Growth Dilemma, has earned a national reputation as a thought leader in business finance. For more than 20 years, Ami has challenged executives to think differently about how they capitalize growth. Ami regularly speaks at corporate, academic and industry events on topics including entrepreneurship and access to capital. Thought-provoking, highly interactive and based on real-time updates to funding options, his presentations address the cash-flow dilemmas entrepreneurs face on a daily basis.





PPA

June 11-13 • Avalon, NJ

Summer Leadership Conference 2023

PRESERVING WHAT MAKES YOU SUCCESSFUL FROM GENERATION TO GENERATION

June 13 from 9:00 AM – 12:00 PM

In our everyday work experience, we generally spend very little time focusing on what makes us successful as a business. This interactive workshop will get you, the participant, to focus on the following:

- The resources that make you successful.
- Who in the organization owns those resources.
- What are you doing to make sure those resources are being preserved for the next generation in your business.

All too often we focus on the tax planning necessary to preserve cash for future generations when in fact we should be expending equal time and energy to preserve the other resources our businesses need to remain competitive in the future. This workshop will get you to focus on those other resources.

ABOUT OUR PRESENTER

William "Bill" Alexander is a member of the faculty of the Wharton School of the University of Pennsylvania, where he lectures on the topic "Strategies and Practices of Family Controlled Corporations". In 2011, he was recognized with an Outstanding Teaching Award from the Wharton Graduate Division. Bill holds an undergraduate degree in engineering from the U.S. Military Academy at West Point and an MBA from the University of Pittsburgh.

