

November 13**4:30 – 7:30 p.m.****AT THE STARDUST**

218 Iowa Street, Davenport, Iowa

Heavy apps and cash bar

*No fee for Quad City Estate
Planning Council and Quad City
Planned Giving Council Members**\$40 for non-members***TO REGISTER scan the QR code:**For sponsorship information or
with any questions, please contact
QCEstatePlanningCouncil@gmail.com**QUAD CITY ESTATE PLANNING COUNCIL &
QUAD CITY PLANNED GIVING COUNCIL***invite you to a special joint social and presentation*

New Approaches to Business Succession Planning

*Featuring special guest speaker***Natalie Reitman-White**

Principal at Purpose Owned, LLC

Natalie is nationally recognized for her work on transformative ownership and investment models. She has over two decades of experience as an executive in the food sector, developing and leading strategic initiatives in sustainable business, trade advocacy, organizational development, governance and human resources. In 2018, she pioneered one of the first-in-the-nation Perpetual Purpose Trust ownership transitions with Organically Grown Company. Following that she co-founded and spent 5 years at Alternative Ownership Advisors, specializing in business ownership succession strategies. She is currently the Board President of the Purpose Trust Ownership Network, a not-for-profit organization dedicated to supporting the growth of purpose trust ownership and employee ownership trusts in the United States.

Business ownership succession planning is a hot topic in the Estate planning community, with over 3 million business owners over the age of 55, of which 83% have no succession plan. Purpose trusts have recently attracted attention as an alternative business ownership and succession planning tool.

They can provide a strategy to transition ownership, maintain business operations, and fulfill the company's mission. While well-publicized use of a purpose trust to own the voting shares of Patagonia in order to preserve the founder's mission of protecting the environment stimulated interest in the concept, however there are business owners of all stripes and sizes innovating with these models.

Natalie Reitman-White, who is one of the pioneers in designing purpose trusts to own businesses, will share her experience-based knowledge on why business owners are choosing purpose-trusts. She will discuss their benefits, challenges, and real-world applications, offering insights into this emerging trend that's redefining business succession planning.

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