



Wednesday,
June 13, 2018

Wells Fargo Building
440 Monticello Ave Norfolk, VA
18th Floor • Conference Center

Succession Planning

How to Build, Grow and Sell Your Practice

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Polaris Greystone
FINANCIAL GROUP, LLC

Looking to **GROW** your business?
Looking to **SELL** your practice?
Looking to **NETWORK** with
others interested in growing or
selling their business?

Financial professionals in the Hampton Roads area are invited to attend a special event hosted by the FPA of Hampton Roads. National keynote speaker, Todd Moss, Senior Partner at Polaris Greystone Financial Group, LLC will be discussing Succession Planning: How to Build and Grow a Financial Services Business and Position it to Sell.

Network and connect with other financial professionals during a rooftop cocktail hour following the presentation.

Space is limited, early reservations suggested.



Todd Moss is the senior partner at Polaris Greystone Financial Group, LLC. He serves on the Investment Committee, helps manage the firm's day-to-day activities and leads all of the firm's M&A activities. Todd has over 35 years of experience in the financial services industry. He is a Certified Financial Planner™ professional and has lectured extensively, including teaching retirement and investment planning strategies at several universities and Fortune 500 companies. Prior to co-founding Polaris Greystone, Todd co-founded Greystone Financial Group. He has also worked at several other regional financial services companies.

Todd received his Bachelor of Arts degree in public administration from Michigan State University. He serves on TD Ameritrade's Presidents Counsel, an advisory board that works with senior management to find ways to improve the industry. He also serves on the Board of Clarkston State Bank. Todd has been named one of America's Top Financial Planners by the Consumer's Research Counsel of America and Reuters. Barron's Magazine has recognized Todd as one of its top 100 Independent Financial Advisors.

In his free time, Todd enjoys playing golf, following Michigan State sports teams, and spending time with his wife and two grown children.

Agenda

- 4:30 p.m. / Registration/Networking
- 5:00 p.m. / Program
- 6:00 p.m. / Cocktail Hour Networking

Cost

- No cost for Chapter Members
- \$25 Nonmembers

Registration: fpasuccessionplanning.eventbrite.com by Wednesday, June 6th