

Oct 2019 CCN Mtg: THE STATE OF ENTREPRENEURS IN THE PHILADELPHIA AREA

PRESENTED BY: Robert B. Simpson CPA, MST & Member of the Philadelphia chapter of "Entrepreneurs Organization (EO)"

Managing Partner of Brinker Simpson and Co LLC

DATE & TIME: Wednesday, Oct. 16th at The Cynwyd Club, Bala Cynwyd, PA

Networking, 5:30 PM; Dinner, 6:30 PM; Talk and Business Session, 7:30 PM

AGENDA



INTRODUCTION



OVERVIEW / EXECUTIVE
SUMMARY



PLANNING FOR SUCCESS
AS A STARTUP



FUNDING



PLANNING FOR STRATEGIC EXITS



OPEN FORUM / FAQ

OVERVIEW & INTRO



We are all Entrepreneurs.
General discussion &
current trends overview



Entrepreneurial
Education & Workforce
Development



Locally based trends and
insights



Strategy

PLANNING
FOR
SUCCESS
AS A
STARTUP

Startup success stories

What to look out for

Adapting to evolving technology &
importance of developing an
adaptable workforce

Developing a strategic business
plan

Building the best team (internally
& externally)

FUNDING

OPM

SBA

PIDC (not to be confused with the chemical company)

Incubators

VC / Private Equity

Crowd Funding?

Other opportunities for funding a venture

PLANNING THE EXIT

Current and emerging trends

Exit strategies – successful & not so successful events

Workforce retention and succession planning

Maximization of value

- Financial reporting
- Tax strategies

Improving profitability with R&D incentives

The importance of forecasting

Tax considerations to increase return on sale



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Relationships
Build Success.
Partner With
Us.**