

NEWS



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Buckingham Advisors to Sponsor Annual Event for Combat-Wounded Veterans

In More News, Buckingham Advisors, Sunbelt Business Advisors of Southwest Ohio and Taft Law Host Financial Webinar Series to Prepare Business Owners for Retirement

Dayton, Ohio [June 8, 2021] – [Buckingham Advisors](#), a comprehensive financial services firm with four locations across Ohio, is once again sponsoring Operation Cherrybend, an annual event that provides combat-wounded veterans with fellowship and activities including adventure, music and community.

The mission of Operation Cherrybend is to thank veterans for their courage, selflessness and sacrifice to our country. This newly formed 501(c)(3) non-profit organization also hopes to educate the general public about the trials and challenges of wounded veterans, and veterans in general. The Veterans Administration says that as many as 20 American veterans commit suicide daily. Operation Cherrybend wants to see that number go down.

“Buckingham Advisors has been a sponsor of Operation Cherrybend for several years,” said Jay Buckingham, Chief Executive Officer of Buckingham Advisors. “Jessica DeBold, manager of our Wilmington office, is a founding member who also serves as Treasurer of the Board for Operation Cherrybend. We are passionate about supporting this organization that provides resources and events to thank wounded veterans for their courageous sacrifice to our country and brings together like-minded people to form a network that helps veterans who are struggling and expand their network of support through fellowship.”

“With May being Military Appreciation month and also being bookended with Memorial Day celebrations, we are hoping that interested citizens will be especially interested in helping us spread the word about Operation Cherrybend,” Buckingham said.

Two fundraisers will help make Operation Cherrybend a success:

- A Sporting Clays Fundraiser was held at Cherrybend on May 22, 2021
- The Heroes Golf Outing Fundraiser, Snow Hill Country Club, will be held June 19, 2021

Money from these fundraisers will provide the capital for:

- Operation Cherrybend's Retreat Week, which will be held September 8 – 12, 2021
- A Heroes Concert on September 10, 2021

To learn more about this important charity, register to participate in the fundraisers, make a donation, or nominate a veteran, please visit www.operationcherrybend.org.

PREPARING BUSINESS OWNERS FOR RETIREMENT AND SALE OF THEIR BUSINESS

Buckingham Advisors recently teamed up with Sunbelt Business Advisors of Southwest Ohio and Taft Law to host a three-part webinar series that created a complete picture for business owners preparing for retirement and the sale of their business.

“We chose to partner Buckingham with Sunbelt and Taft Law because our three firms’ combined expertise enabled us to deliver a comprehensive start-middle-end guide to the complete process for preparing for and selling a business,” said Linda Parenti, Chief Investment Strategies for Buckingham Advisors.

Below are some details on the series. [Click here to access recordings of the webinars.](#)

May 18, 2021 (Recording available online)

Preparing Your Business (For Sale/Exit) & Why It's Important. There are many ways to get it wrong, but only a thoughtful, well planned strategy will help an owner get it right. Preparation is key to a successful transaction.

Topics of discussion:

- Current Market Conditions
- Steps in Getting Your Business Ready for Sales
- Cleaning Up Your Books
- Importance of Valuations & Appraisals
- Tax Implications for Different Allocation of Assets
- Understanding What You Need to Retire
- Pre-Sales Due Diligence
- Updating Documents

May 25, 2021 (Recording available online)

The Business Sales Process: Steps in the Transaction. In order to have a smooth, worry-free transaction, you want to have a team that can help you navigate the financial, legal, and emotional elements of selling a business.

Topics of discussion:

- Steps in the Transaction
- Receiving an Offer
- Financial Due Diligence
- Working With the Banks
- Legal Documents: Purchase Agreement, Non-Compete, etc.
- Managing Emotions
- Communication Between the Seller and the Buyer

June 1, 2021 (Recording available online)

We Closed/Sold the Business. Now What? Signing the closing documents isn't the last step in a successful transaction.

Topics of discussion:

- Successful Sale of Your Business
- Post-Close Details
- Training and Transition
- Employee Introductions
- Legal Issues
- How to Invest Proceeds
- Taxes

ADDITIONAL RESOURCES AVAILABLE ON-DEMAND

In addition to the upcoming webinars, the [Buckingham Video Library](#) on the company's website provides public access to recorded webinars on a range of subjects. Buckingham's professional team conducts extensive market and investment research, and addresses numerous personal and business planning topics in these videos. The scope of the videos includes such topics as: estate planning essentials, Special Purpose Acquisition Companies (SPACs) and digital currencies, the latest relief package, PPP Loan information, grants and extensions in American Rescue Plan Act, and ongoing financial trends and updates.

Additionally, the firm's [Insights](#) blog provides timely information on business services, financial planning, investment management, tax and technology.

ABOUT BUCKINGHAM ADVISORS

Ohio-based Buckingham Advisors is a unique team of professionals that works together to create professional and personal financial success for its clients. Buckingham's professionals are fiduciaries, putting their clients' needs ahead of their own. The company's core purpose is to improve the lives of clients by providing clarity, simplicity, and the professional expertise of Buckingham's financial planners, investment professionals, tax strategists and accounting team. Buckingham specializes in aligning the solutions clients need to help them achieve the best possible financial and life outcomes. The firm offers personal and business financial solutions, providing one team for all their clients' financial needs. A free second-opinion service is available for prospective clients (no cost or obligation). For more information visit [MyBuckingham.com](#).

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