

Professional Development Luncheon

BUILT TO LAST - Valuing, Protecting & Passing on the Business

Most business owners spend a lifetime building their business. Few know exactly what it is worth, how to protect it, or how to transfer it successfully. Join local leaders in accounting, law, and financial planning as they explore the:

THREE QUESTIONS EVERY BUSINESS OWNER MUST ANSWER

WHAT HAVE I BUILT?

HOW DO I PROTECT IT?

HOW DO I PASS IT ON?

Featured Speakers:

Paul Thorstenson, CPA, ABV
Partner | Ketel Thorstenson LLP
Topic: Business Value

Jennifer Tomac
Certified Elder Law Attorney | Tomac & Tomac Law Firm
Topic: Legal Protection

Edward Bartling, MBA, CLU, FLMI, ACS, AIAA
Chief Operating Officer | Financial Markets Inc
Topic: Legacy & Succession

Special Feature Session:

Bring It All Together

Real-World Business Owner Case Study

Discover an innovative valuation resource with **Financial Markets Inc** that helps advisors:

- Start meaningful conversations with business owners
- Identify succession planning opportunities
- Uncover retirement and legacy concerns
- Strengthen relationships with CPAs and attorneys
- Create actionable planning solutions

Tuesday

Sept. 29, 2026

9:00 AM – 12:00 PM

1 hour South Dakota Life & Health Insurance **CE credit** will be provided (If desired, NPN # required). This is a **FREE** event sponsored by Financial Markets Inc with lunch provided by Angel's Catering.

Location:

Western Dakota Technical College
800 Mickelson Dr
Rapid City SD 57703
Phone: 605-718-2400

Registration:

Early registration is encouraged.
Visit fmiAgent.com/09-2026-Luncheon

Professionals Invited to Attend:

Financial Advisors, Insurance Professionals, CPAs, Attorneys, Trust Officers, Bankers, Estate Planners, Business Planning Specialists, NAIFA, Big I, West River Estate & Financial Planning Council Members, and Professional Staff Members.



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