You could retire after selling your business.

But you won’t.

We know, because we know you well.
Knowing our clients well gives us the insight to help with their wealth — and their lives. Before, during and after the sale of a business, we help navigate all aspects of the transition and shift the focus to what comes next. Find out how strong relationships lead to 96% client satisfaction.

bnymellonwealth.com | @BNYMellonWealth
BNY Mellon Wealth Management Collaborates with UCI

For many private business owners, business is personal. A private business often embodies the owner’s core principles and values; as a result, they typically invest a meaningful portion of their time and personal wealth in the business. At BNY Mellon Wealth Management, we have built an exclusive set of capabilities aimed at addressing the unique wealth challenges of business owners. Our specialists use custom tools and deep financial expertise to help business owners achieve greater personal and professional success. They work closely with clients to reduce uncertainty and provide proactive advice for private business owners when it is most needed.

As part of our effort to better serve the private business owner community, we are collaborating with UCI’s Paul Merage School of Business to gain greater insight into Orange County business owners and how they feel about their level of readiness for transitioning their business.

We’ll partner to collect information from closely-held businesses based in, or with primary operations in, Orange County. We hope to better understand the succession and transition plans that owners are considering or have initiated. The research will also address key considerations, such as: assembling the right deal team, developing transition guidelines, and the exit metrics and processes that need to be in place to ensure a successful transition.

BNY Mellon has partnered with UCI’s Paul Merage School of Business because we value their strong commitment and leadership in the Orange County business community. Their dynamic curriculum and programs help to prepare future business leaders and support the evolving ecosystem of entrepreneurial firms in Orange County. We have a great history with the institution and are a partner, as well as a founding Advisory Board member, of UCI’s Merage School Center for Investment and Wealth Management.

For more information about our owner-readiness research or how BNY Mellon Wealth Management provides advice for private business owners, please contact:

Riyad Said
Senior Wealth Manager
949-253-5059
ryad.said@bnymellon.com

Kris Reddaway
Senior Wealth Director
949-253-5018
kris.reddaway@bnymellon.com
We are guessing that if you’ve driven down Campus Drive in Newport Beach over the past few months, between the private jet terminals across from John Wayne, you’ve probably noticed a new automobile showroom not displaying new cars, but instead classic ones! Morris and Welford, a classic and vintage car dealership, has opened at 4040 Campus Drive primarily specializing in sports and racing cars from the 1950s and 1960s. Malcolm Welford and Miles Morris have partnered with England’s premier classic dealership, JD Classics, to enter the North American classic car market, and they have chosen Newport Beach as their headquarters. The fabulous showroom features Aston Martins, Ferraris, Bentleys and even a 1920 Stutz ‘Bearcat,’ one of the first American supercars. They have recruited Pat Persichini, formerly from Ferrari of Newport Beach, to head up sales, and when we asked Pat “why the move from Ferrari after 18 years?” He answered, “Classic cars transport us to a different era...the sounds, the chrome, the designs are all captivating and evoke wonderful memories in all of us. These beautiful cars have also proven to be actual investments over time while most new cars plummet in value, adding to the allure of the classic car hobby. M&W buys, sells and consigns these cars and can offer unique methods to finance them.” Morris and Welford are excited to be in Newport Beach and look forward to becoming part of the community. They are open during the week from 9 a.m. to 5 p.m. and by appointment on the weekends to cater to their clients’ busy schedules.

Morris and Welford is located at 4040 Campus Drive in Newport Beach. Please call 949-679-4999 and visit www.morrisandwelford.com for more information.
“We work with a team of experts at First Republic. They really get our industry.”

FRANCISCO PARTNERS
Dipanjan (DJ) Deb, Co-Founder and CEO (right)
John Herr, CFO (left); Megan Austin Karlen, Director, Capital Markets (center)
Grace Kim, Director of Talent (seated)

FIRST REPUBLIC BANK
It’s a privilege to serve you*

(855) 886-4824 | firstrepublic.com | New York Stock Exchange symbol: FRC
MEMBER FDIC AND EQUAL HOUSING LENDER 🏡
Wait... what?

Every two seconds

a new lawsuit

is filed in the U.S.

We know that

safeguarding

your assets

and legacy

isn’t child’s play.

Call us for a complimentary consultation.

JEFFREY M. VERDON LAW GROUP, LLP
The Fusion of Planning and Protection.

1201 Dove Street, Suite 400
Newport Beach, CA 92660
333 Twin Dolphin Drive, Suite 220
Redwood City, CA 94065
949.333.8150  ▼ www.jmvlaw.com