



PRIVATE WEALTH

& Advisers

CUSTOM CONTENT • June 4, 2018

Presented by



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Source: 2017 Client Satisfaction Survey. BNY Mellon Wealth Management conducts business through various operating subsidiaries of The Bank of New York Mellon Corporation.
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Better Understanding Business Owners in Orange County

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
riyad.said@bnymellon.com



Kris Reddaway
Senior Wealth Director
949-253-5018
kris.reddaway@bnymellon.com



Classic Car Specialists Open in Newport Beach

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.

Marshack Hays LLP is proud to announce

Chad Haes and David Wood have accepted partnerships with the firm. They both bring unique experiences to the firm and we wish them continued success in the years to come.

MARSHACK HAYS LLP ATTORNEYS AT LAW



Mr. Haes' practice areas include bankruptcy litigation, business and civil litigation, lender liability, creditors' rights, and appeals.

Mr. Woods' practice areas include Chapter 11 business reorganizations, representation of Chapter 11 debtors, Chapter 7 and 11 trustees, and related litigation.

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FRANCISCO PARTNERS

Dipanjan (DJ) Deb, Co-Founder and CEO (right)

John Herr, CFO (left); Megan Austin Karlen, Director, Capital Markets (center)


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