

# PAVING

# THE WAY



Sonesta Charlotte Executive Park  
5700 Westpark Drive, Charlotte NC 28217

2022  
9/21<sup>st</sup> - 23<sup>rd</sup>

ANNUAL  
CONFERENCE

## WEDNESDAY, 9/21/22

12:00 - 1:00PM	Registration
1:00 - 5:00PM	IBBA Course #224: Pricing a Business to Sell - <b>Lou Vescio</b>
5:00 - 6:00PM	CVBBA Board Meeting
6:00 - until	CVBBA Welcoming Reception and Networking Event - Sponsored by <b>First National Bank</b>

## THURSDAY, 9/22/22

6:30 - 8:00AM	Continental Breakfast/Registration - Sponsored by <b>Customers Bank</b>
8:00 - 8:30AM	Welcome and Opening Remarks - <b>Joe Santora</b>
8:30 - 8:45AM	Legislative Update - <b>Rick Chess</b>
8:45 - 9:15AM	Maximizing your IBBA Joint Membership - <b>Kylene Golubski</b>
9:15 - 10:00AM	Winning Listing Engagements with Larger Businesses - <b>Jay Offerdahl</b>
10:00 - 10:30AM	Break with Sponsors
10:30 - 12:00PM	CVBBA Co-Brokering and MLS - <b>Rupesh Bharad, Joe Santora, Dustin Zeher</b>
12:00 - 1:00PM	CVBBA Member Excellence Awards - Sponsored by <b>SouthState Bank</b>
12:00 - 1:00PM	Lunch - Sponsored by <b>SouthState Bank</b>
1:00 - 2:00PM	Panel - Best Practices: Handling Challenging Transactions - <b>Kent Adams, Ron Buck, Mike Metzger, Adam Petricoff</b>
2:00 - 2:15PM	Break
2:15 - 3:00PM	Panel - Best Practices: Growing Your Business - <b>Matt Bradbury, Jay Offerdahl</b>
3:10 - 3:55PM	Best Practices: Pricing Businesses and Not Leaving Money on the Table- <b>Matt Bradbury</b>
3:55 - 4:30PM	Break with Sponsors
4:30 - 5:30PM	Panel - Best Practices: Tools to Maximize Lead Generation, Marketing, & Advertising - <b>Lanayah McCullouch, Marc Pitre, Ron West</b>
* 5:45 - 6:45PM	Headshots - <b>Right Here Interactive</b>
6:00 - until	Networking Reception, Dinner & Drinks - Sponsored by <b>Live Oak Bank</b>

## FRIDAY, 9/23/22

6:45 - 8:00AM	Breakfast with Sponsors
8:00 - 9:00AM	Legal Issues Just Below the Surface - Avoiding Potential Mines, Depth Charges and Torpedoes - <b>Jim Joyce, Bobby Robinson</b>
9:05 - 10:15AM	Panel - Lending in Today's Current Environment - <b>Customers Bank, Diamond Financial Services, First National Bank, Live Oak Bank, Pinnacle Financial Partners, SouthState Bank</b>
10:20 - 11:20AM	Developing a Practice Specialty for Business Brokers - <b>Justin Scotto and Lou Vescio</b>
11:30 - 11:55AM	CVBBA Minimum Standards - <b>Tully Ryan</b>
12:00 - 1:00PM	Lunch - Sponsored by <b>Diamond Financial Services</b>
12:20 - 1:05PM	Follow Up MLS Q&A - <b>Rupesh Bharad, Joe Santora, Dustin Zeher</b>
1:05 - 1:20PM	End of Meeting/Wrap Up/ Raffle Prizes

\* Headshots also available during Thursday and Friday