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In The News . . .

***GREER & WALKER AND OPPENHEIMER TRUST CO-HOST
FINANCIAL SECURITY PANEL***

Charlotte, N.C. February 2, 2010)—The affiliates of Charlotte-based accounting firm Greer & Walker, LLP, Greer & Walker Investment Advisors and Greer & Walker Corporate Finance, together with the New York based Oppenheimer Trust Company recently presented a panel discussion held at the Ritz-Carlton hotel entitled “Financial Security From Your Privately Held Business.”

The event addressed key considerations and opportunities for the large number of business owners approaching retirement over the coming years. Keynote speakers James Reichard, Jay Carter, and James Carley emphasized that the next decade will produce the largest generational transfer of wealth in history, much of which is tied up in privately held businesses.

“Timely planning is crucial to the success of what is likely to be the most significant financial event in the lifetime of a business owner,” said Jay Carter, managing director of Greer & Walker Corporate Finance. “Even if retirement is not planned for the near future, defining your financial goals and developing a strategy early can make a huge difference whether you sell your company or transfer it to your children.”

According to Jim Reichard, CPA and managing member of Greer & Walker Investment Advisors, “Our goal was to give a comprehensive overview of the different aspects that need to be addressed in a successful retirement strategy—from financial planning, to business sale and transfer, to estate and tax considerations. We were very pleased that James Carley, president and CEO of the Oppenheimer Trust Company based in New York, took the time to join us and share his expertise in the estate planning area.”

Greer & Walker Investment Advisors, LLC is an affiliate of Greer & Walker, LLP, Charlotte’s largest locally-owned accounting firm. Founded in 1997, Greer & Walker Investment Advisors, LLC provides a

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comprehensive range of financial services to help clients improve their long-term financial success and to deliver a high-level of personalized service. Greer & Walker Investment Advisors, LLC is a Registered Investment Advisor. For more information about the firm, call Jim Reichard at 704.377.0239 or visit www.greerwalker.com.

Greer & Walker Corporate Finance, LLC is the exit planning and investment banking affiliate of Greer & Walker, LLP. The entity founded in 2008 uniquely combines exit planning with professional merger and acquisition advisory services to provide a complete, integrated solution for middle market companies and their owners. For more information on Greer & Walker Corporate Finance call Jay Carter at 704.353.8208 or visit www.greerwalker.com.

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