**CFO Forum Lehigh Valley Minutes** **Preparing to sell your business July 2020**

**Today’s ZOOM and live event featured a panel of two of our very experienced CFO discussing how to prepare for the sale of your business and selling it.**

**John Dunbar (multi firm CFO who has done at least five exits in the last 20 years) and Joe Montesano (who has done at least two exits) shared an excellent presentation ranging on the entire process, the demands on the CFO and the good and bad lessons learned.**

**There were too many lessons and best practices to summarize here so please view (and save the slides). I will get the due diligence checklist for your to review and retain for possible use in the future.**

**Bottom line is that preparing for a sale and managing the sale is a full time, stressful job for the CFO AND the day job still needs to be done-calmly and professionally so the rest of the organization does not figure out that the company may be sold.**

The slides are attached and the ZOOM session was recorded and will be sent to you (or contact me for a copy).

**Next session:**

**The August 19 (Wednesday)** topic will be determined. This will be the final catch up session.

We will then decide our topics and structure going into our **year 6**! Sessions will be ZOOM based for the foreseeable future.

**Housekeeping:**-Minutes, slides and CPE letters are available at [www.thecfosolution.org](http://www.thecfosolution.org) under the past events tab. CPE letters usually take about a week to get posted. If you are missing one from last year, let me know and I will provide it. The password for our content is mrc(lower case). Download your CPE letter.

**Reminder:** I have been talking to some of you and most conversations have been about topics that we have talked about in the last few years. Whether it was the tax savings actions, cost reductions, healthcare reviews and ideas, new employee incentives and credits and probably a dozen other topics, money is being left on the table. If you want to chat and share what is keeping you up at night, maybe we have covered a possible solution. Just call me.