



THE GREAT WEALTH TRANSFER: HOW GENERATIONAL CHANGE IS SHAPING THE M&A MARKET

ORANGE COUNTY BAR ASSOCIATION
BUSINESS & CORPORATE LAW SECTION
NOVEMBER MEETING: IN PERSON

OCBA OFFICES
4101 WESTERLY PLACE
NEWPORT BEACH, CA 92660

SPEAKERS:
KEVIN DYKES
FINANCIAL ADVISOR,
CAPSTONE PARTNERS
FINANCIAL & INSURANCE
SERVICES

CHANNING HAMLET
MANAGING DIRECTOR,
OBJECTIVE, INVESTMENT
BANKING & VALUATION

BEN PHILLIPS, CFA
FAMILY OFFICE SPECIALIST,
PIMCO

**REGISTER AT
WWW.OCBAR.ORG**

**APPROVED FOR 1.0
MCLE CREDIT**

WEDNESDAY, NOVEMBER 5TH, 2025
Registration: 11:30 AM | Program: 12:00PM – 1:00PM

This presentation will explore the intersection of demographics and deal-making, focusing on how the aging business-owner population is driving a wave of business sales and reshaping the M&A landscape. With baby boomers retiring at record rates, trillions of dollars of privately held business value will change hands in the next decade. These business transitions are creating both challenges and opportunities for buyers, sellers, investors, and their advisors. We'll discuss market trends, succession planning considerations, and the legal/structural issues that arise in these generational wealth transfers. The program will also highlight the role of attorneys in helping clients navigate these transactions strategically and responsibly.

	In Person <i>Lunch Included</i>
Business & Corporate Law Section Members:	<i>*Complimentary*</i>
OCBA Attorney (Non-Section Member):	\$50
Non-OCBA Member Attorney:	\$60

This activity has been approved for MCLE by the State bar of California in the amount of 1 hour(s) as appropriate to the content of the activity. OCBA is a state bar approved MCLE provider and certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the state bar of California governing MCLE. Attendees must watch the program in its entirety in order to receive Participatory MCLE credit. Cancellations must be received in writing via fax or email 3 business days prior to the meeting. OCBA reserves the right to substitute speakers.

OCBA BUSINESS & CORPORATE LAW SECTION MEETING – NOVEMBER 5TH, 2025

Name (print): _____ Email: _____

By providing your email address, you agree to allow the OCBA to email you regarding relevant OCBA information.

Firm Name: _____ Bar #: _____ Phone: _____

Business Address: _____ City/ZIP: _____

Visa/MasterCard/Amex/Discover: _____ Expiration Date: _____ CVV: _____

Cardholder Name: _____ Signature: _____

\$ _____ enclosed/to be charged (Make checks payable to the OCBA)

Register online, fax or mail | Mail to: OCBA, P.O. Box 6130 Newport Beach, CA 92658 | Fax to: 949-440-6710

If you are registering by fax or mail within 3 days of the meeting, please contact the OCBA at education@ocbar.org to ensure registration.