

For Immediate Release



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## Small Business Transaction Expert speaks October 2 at Georgia Association of Business Brokers Conference

ATLANTA - The difference between profit and loss can sometimes boil down to understanding the balance sheets, tax codes and accounting. Nationally known expert Monty Walker will lead seminars in understanding business financial statements and transaction tax code at the Georgia Association of Business Brokers state-wide Fall Conference on October 2, 2009 in Atlanta.

Walker is sought after nationally for his comprehensive expertise in the private closely-held business arena. Growing up in an entrepreneurial family, Walker was bagging groceries and stocking shelves at the family market and washing dishes in family restaurants after school. By the age of 20, he was managing a beverage distributorship with \$8 million in annual revenue.

In this economy, many people are looking at going into business for themselves, says Walker, a Texas CPA who has been recognized by his peer group in the Business Transfer Industry as one of the foremost innovative advisors to Small Business Owners in the areas of Business Transactions, Business Structuring & Design, Business Tax Planning and Business Exit Planning.

“Most people when they hit their mid-40’s, what they want to do with their lives moves **from success to significance**,” says Walker. Potential business owners move from wanting to be the next millionaire to wanting to do something to make a difference.

In his presentation, Walker will give GABB Conference attendees a “working understanding of business processes, accounting, tax and structuring.” He promises his talk will help “budding entrepreneurs to make something better in their lives.”

Walker’s “Understanding Financials” session is part of a financial Boot Camp Series that will help potential business owners interpret “all those numbers on the Income Statement and Balance Sheet mean and how they actually arrived there.” This class will help participants “understand what all the ‘bean counters’ seem to know and a lot of us find challenging,” says Walker.

As a result of this session, participants will be able to:

- Identify the main components of financial statements
- Differentiate between cash and accrual accounting methods
- Compare debits and credits
- Create accounting entries
- Explain the purpose of a trial balance and general ledger
- Compile financial statements

In a second session, Walker will tackle the tax code and related transaction structuring, which is “in a constant state of change.”

This session will cover current key tax act modifications and other significant and often misunderstood business tax and structuring topics.

By attending this session, attendees will gain a broader understanding of:

- Year 2008 Net Operating Loss Carryback (NOL)
- New Section 179 Limits
- Qualified Small Business Stock
- New Temporary S-Corporation Built-In Gain Rules
- Current Like Kind Exchange provisions
- Retirement Plans Investing in Small Businesses

Business brokers, as intermediaries, can guide people who are either looking to sell or buy a business through the often overwhelming process. The Georgia Association of Business Brokers (GABB) is the state’s only professional organization and Multiple Listing Service dedicated to the purchase and sale of businesses and franchises, and the merger and acquisition market.

Many of the more than 100 members and associates of the GABB, founded in 1986, have commercial real estate experience or serve the industry as attorneys, CPAs, financial planners, lenders, appraisers or environmental experts. The GABB offers one of the foremost multi-list support systems (BBMS) in the U.S. for broker members to provide a common database for instant access to listing details to enhance the co-brokering process and expedite business sales.

The GABB Fall Conference is open to the public and will be held on Friday, October 2, 2009, from 8:00 a.m. until 5:00 p.m. in the conference room of Metro Brokers GMAC Real Estate at 5775 Glenridge Drive, Building E, Classroom 1, Atlanta, GA 30328. Registration is \$50 for GABB members and \$100 for non-members, plus \$25 for those wishing to earn real estate licensing credit. After September 21, there will be a \$15 late registration fee. Register at <http://www.gabb.org> or contact Pat Harkins, Conference Chairman, at (770) 649-7666, or Charles Jay, Education Chairman, at (478) 477-6272.

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*Note to Media: Journalists are invited to attend and cover the conference. To interview a conference expert, contact Stuart Brady at (404) 663-8080 or [sjb@theBUSINESSHOUSEinc.com](mailto:sjb@theBUSINESSHOUSEinc.com) or Diane Loupe at (404) 374-3990 or [dloupe@mindspring.com](mailto:dloupe@mindspring.com)*

## Monty W. Walker - Biography



**Monty W. Walker**  
**CPA, CBI, BCB**  
**Walker Advisory Associates**  
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Monty W. Walker is a Certified Public Accountant with a diversity of experience in the private closely-held business arena. Having come from an entrepreneurial family, Monty has a comprehensive business background spanning over 24 years which includes experience in both startups and established entities. Monty spent a significant portion of his career as an industry CFO in the private sector for an Investment Trust based in Dallas, TX. He has also owned and operated several of his own businesses. Thus, his experience comes from being directly in the trenches.

Monty supports Entrepreneurial Clients throughout the country. He has been recognized by his peer group in the Business Transfer Industry as one of the foremost innovative advisors to Small Business Owners in the areas of Business Transactions, Business Structuring & Design, Business Tax Planning and Business Exit Planning. Monty's flagship and most sought after service from clients throughout the county is his Business Transaction Advisory Services. He works with Business Sellers, Business Buyers and their various advisors, such as Business Intermediaries, Accountants and Attorneys, to manage the unique financial, tax, planning and procedural matters associated with Buying and Selling a business. Due to his background in the area of business transfers and business transitions he is often referred to by his clients and colleagues as a "Business Transaction CPA."

### A few points of interest...

- Works with Business Sellers, Business Buyers and their various advisors, such as Business Intermediaries, Accountants and Attorneys, to manage the unique financial, tax, planning and procedural matters associated with Buying and Selling a business.
- Has a comprehensive business background in the private closely-held sector spanning over 24 years which includes experience in both startups and established entities.
- Manages and administers plans which enable entrepreneurs to use their accumulated retirement money as a business capitalization source while preserving tax deferrals and without incurring penalties. His advisory services in the qualified money arena include solutions using Self-Directed IRAs and Small Business Investment 401(k) Plans.
- Developed and assists Entrepreneurs throughout the country with a unique proprietary comprehensive transaction planning review resulting in a deliverable entitled a Tax and Structuring Analysis Report.
- Works with clients throughout the country rendering advisory support for Business Transactions, Business Exit Strategies, Business Tax Planning and Business Transition Planning.
- Subject Matter Expert for the International Business Brokers Association in the area of Business Transaction Taxation, Structuring and Planning. He is also an approved instructor for the International Business Brokers Association, the Texas Real Estate Commission and the Texas Department of Insurance.
- Authored various business transfer taxation and structuring courses and various other business transfer related workshop topics he teaches for these organizations.
- Due to his background in the area of business planning and business transfers he is often referred to by his clients and colleagues as a "Business Transaction CPA."
- Is a member of the American Institute of Certified Public Accountants, the International Business Brokers Association, the Texas Association of Certified Public Accountants, the Texas Association of Business Brokers, the Institute of Certified Business Counselors and the Society of Financial Service Professionals.
- Certified Public Accountant, Certified Business Intermediary, Board Certified Broker.