



**Pinnacle Bank** cordially invites you to attend our next Pinnacle Bank INSIGHT Briefing titled “What Is Your Business Worth And Why You Need To Know.” This thirty minute presentation by Don Reichert and Brad Davidson will show why owners typically misjudge what their companies are worth and how misvalue prevents owners from achieving their goals. This knowledge may also allow owners to cut taxes and increase their retirement nest-eggs.

Don Reichert, president and founder of Capital Design Associates, Inc., has been serving the Upstate for over 18 years and provides the very best in comprehensive business and family wealth management and planning services through its proprietary planning process: The Capital Wealth Management Solution™ and its Seven-Step Exit Planning Process for business owners. Don’s guest, Brad Davidson, is president of Securities Pricing And Research, Inc., a firm headquartered in Elkridge, Maryland that has valued over 27,000 privately-owned businesses since 1991. Brad is a recognized expert in the field and has received speaking invitations from organizations such as the IRS, SEC, and the Federal Reserve. His experiences include work on Capitol Hill for a U.S. Congressman, a financial advisor for Merrill Lynch and Prudential Bache, and a general partner of two investment funds.

I believe you will find this brief presentation to be most enjoyable and valuable. Please let us know if you will be able to join us for this unique opportunity. We look forward to seeing you!

Sincerely,

David Barnett  
President/CEO

## Pinnacle Bank INSIGHT Briefing

Tuesday, August 24, 2010 • 6 - 7 pm

Pinnacle Bank Main Office

937 North Pleasantburg Drive • Greenville, South Carolina 29607

Featuring Guest Speakers

**Don Reichert and Brad Davidson**

RSVP by August 13 to 864-233-6915

[www.pinnaclebanksc.com](http://www.pinnaclebanksc.com)





### Don Reichert

Capital Design Associates, Inc., (CDA) has been serving the Upstate for over 18 years. Its staff of 9 is dedicated to providing the very best in comprehensive business & family wealth management & planning services through its proprietary planning process: The Capital Wealth Management Solution™ and its Seven-Step Exit Planning Process for business owners. Through its interface with collateral professionals both locally and nationally, CDA functions as its clients' Personal Financial Officer (PFO), guiding them through all of the various phases of financial management from today to their dreams.

As the firm's President and founder, Don Reichert leads the CDA team. Don's ambitious educational pursuits have earned him the following professional designations: Master of Science in Financial Services, Chartered Financial Consultant, Accredited Estate Planner, Chartered Life Underwriter, & Charitable Advisor in Philanthropy. Don is a community leader here in the Upstate as well and has acted as a board member locally for the YMCA, Greenville Ballet, Red Cross, St. Joseph's High School, & St. Mary's Church, and assists the Greenville Hospital System with their philanthropic efforts in his capacity as a financial advisor.

Our clients are your neighbors, colleagues, family members, and friends. Our services are not for everyone, but if you are a high-net worth entrepreneur in the Upstate, we encourage you to give us a closer look.



### Brad Davidson

Brad Davidson is president of Securities Pricing And Research, Inc. ("SPARDATA") Since 1991 SPARDATA has valued over 27,000 privately-owned businesses at the request of owners; advisors (including financial advisors, trust officers, CPAs and attorneys) and government institutions. Financial service providers that have chosen SPARDATA to provide valuation services to their clients include New York Life, AXA Advisors, National City Bank, MassMutual, PNC Bank, Guardian and Morgan Stanley Trust.

Mr. Davidson is a recognized expert in the valuations field. Organizations which have invited him to lecture including the Internal Revenue Service, the Securities and Exchange Commission, the North American Securities Administrators Association, the Department of Labor, the Federal Financial Institution Examination Council, the Federal Reserve, the Michigan Bankers Association, the Virginia Bankers Association and the American Society of Pension Actuaries. The Company's valuation reports have been cited on numerous occasions by the Wall Street Journal as well as other publications.

Mr. Davidson has worked on Capitol Hill for a United States Congressman (1977-1980); as a stockbroker with Merrill Lynch (1981-1983) and with Prudential Bache (1984-1986). In 1986 he formed the predecessor firm to SPARDATA and acted as general partner of two investment funds. Since 1991 SPARDATA's sole activity has been valuing privately owned enterprises.

Mr. Davidson graduated with a Bachelor of Arts degree from St. John's College in Annapolis, Maryland in 1977 where he lives with his wife and two children. He is a retired Captain in the United States Army Reserve. In 1981 he became the youngest person ever elected to the Annapolis City Council; he was reelected without opposition in 1985. In 1987 Governor William Donald Schaefer appointed him Chairman of the State Commission on the Capital City, a position he held until 1996. From 1984 until 2002 Mr. Davidson was a Director of Microsemi Corporation of Santa Ana, California, a publicly-held manufacturer of electronic products; and he currently serves on the boards of non-profit organizations in Maryland and New York.