



## An Introduction to the Mergers and Acquisition Process

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### ORIGINAL PROGRAM DATE

May 5, 2026

### REPORTING YOUR CREDIT

This on-demand program was a live seminar presented on May 5, 2026. If you attended or viewed the original presentation, please note that WSBA members may not claim credit for the same CLE sessions if repeated within their three-year reporting period.

### DESCRIPTION

This on-demand seminar will provide an overview of the issues to be considered when advising clients on the purchase or sale of a business. Includes a review of the elements involved in conducting a valuation of the business, the transaction timeline and role of advisors for a successful process and the impact of private equity in the M&A marketplace.

### AGENDA

#### 1 Understanding the M&A Timeline and the Role of Advisors

A panel of experienced M&A advisors will share their perspectives on the various steps to completing a successful sale or purchase of a business. Includes insights regarding running a process to identify buyers or sellers, conducting due diligence, selecting the appropriate structure to address tax and accounting issues, documenting the transaction, obtaining required approvals and achieving a successful closing.

*Richard Repp - Witherspoon Brajcich McPhee, PLLC, Spokane, WA*

*Adam Sweet - Eide Bailly LLP, Spokane, WA*

*Ed Kirk - Chinook Capital Advisors, Seattle, WA*

#### 2 Value Creation Strategies Before Selling a Business

During this session, participants will explore common value creation strategies in advance of selling a business. Topics will include several avenues covering financial viability, value proposition, customers, and infrastructure.

*Sami El Kurdy - Richey May, Tacoma, WA*

#### 3 Private Equity and the Public Good

During this session, participants will explore the nature of private equity funds. These large funds that have come to dominate our economy and restructure many businesses. This presentation will ask whether on the whole they are beneficial to society.

*Dan Morrissey - Gonzaga University School of Law, Spokane, WA*