



2025 AND BEYOND: STRATEGIC MOVES FOR BUSINESS GROWTH AND SUSTAINABILITY

Presented by **Gene Marks, CPA**

A new administration is taking office. Higher costs and labor shortages continue to present challenges. Regulations are taking a bite. Tax policies are changing. Deficits and debts are rising. AI is taking over the world with both significant risks and huge potential gains. Succession planning is quickly becoming a higher priority.

Challenges. Opportunities. Risks. Rewards. What are some of the smartest and most experienced business leaders doing to navigate their companies towards growth, sustainability and profitability in 2025 and beyond? What changes are they making in their operations and cash management? How are they attracting and retaining talent?

What technologies are they investing in? How are they addressing both federal and local regulations that are impacting their businesses?

During this fast paced, entertaining and extremely valuable discussion, Gene will go over real life, feet-on-the-ground strategies and tactics that smart leaders are using to navigate their way through an uncertain economy, a changing and more divisive political environment, technological and workplace decisions so that they can position their companies for future growth.

During this presentation, Gene will cover some of these topics:

- ✓ Key economic trends and metrics and the strategies smart companies are using this year to navigate inflation and supply chain issues;
- ✓ An update on congressional initiatives that will impact your industry;
- ✓ Tactics that forward-thinking leaders are using to not only retain their best employees during a downturn but to attract new talent;
- ✓ Cash flow moves managers are making now to ensure they have adequate reserves for the downturn;
- ✓ The latest technologies that are attracting investments from small and mid-sized companies and which are helping to keep overhead low and profits growing.



Gene's presentations help business owners and managers of all industries to look ahead, with specific actions for growing and profiting based on the strategies of other business owners in their industry.



G E N E
MARKS

**AUTHOR. COLUMNIST.
KEYNOTE SPEAKER.
CRM ADVISOR.**

Forbes



The Guardian

The Washington Post **The Philadelphia Inquirer**

The New York Times **Entrepreneur.com**

See Gene in Action
www.GeneMarks.com



A past columnist for both The New York Times and The Washington Post, Gene now writes regularly for The Guardian, The Hill, Forbes, The Philadelphia Inquirer, The Washington Times and The Chicago Daily Herald.

Gene also hosts two very popular podcasts: Thrive and Small Biz Ahead where he interviews politicians, economists, policy makers, celebrities and entrepreneurs that impact business.

Gene has written 5 books on business management, specifically geared towards small and medium sized companies. His most recent is *Want More Cash?: 100+ Ideas And Strategies For Increasing Your Company's Cash Flow This Year*.

Nationally, Gene appears regularly on Fox Business, MSNBC, as well as CBS Eye on the World with John Batchelor and SiriusXM's Wharton Business Channel where he talks about the financial, economic and technology issues that affect business leaders today.

Gene owns and operates the Marks Group PC, a highly successful ten-person firm that provides technology and consulting services to small and medium sized businesses.

Prior to starting the Marks Group PC, Gene, a Certified Public Accountant, spent nine years in the entrepreneurial services arm of the international consulting firm KPMG in Philadelphia where he was a Senior Manager.



Through his keynotes and breakout sessions, Gene helps business owners, executives and managers understand the political, economic and technological trends that will affect their companies and—most importantly—the actions they can take to continue to grow and profit.

TESTIMONIALS



"I finally got to hear Gene speak! This was at our National meeting in Orlando. **He is AMAZING!** Our builders loved him and just everything he had to say. Unfortunately, I only caught the last 15 mins or so of his speech due to working at the event for the most part. But just from what I heard **I was "wowed" to say the least.** He is truly amazing at what he does."

— *Sylvia Gonzalez, Sales & Marketing Administrator, Nucor Building Systems*



"Good morning, **Gene, without a doubt, your presentation was the best closing session I have ever attended.** I know you are doing the kickoff for Symposium and I'm sure I will be saying the same for the kickoff session. Somehow, you managed to make all the tough news entertaining. It was a master class on presenting."

— *Linda Dodd, Learning Specialist, North Carolina Association of CPAs*



"In a word.... **WOW! Gene absolutely delivered.** He was spot on for our small business members. He packed a lot into 45 minutes and left everyone with something to take away. People were taking pictures of his slides during his presentation. The conversations about his keynote continued throughout the day. People said they emailed him right after he got off stage. Others mentioned that they were emailing their own accountants to find out if the advice he was giving could help them. They found out that they were entitled to tax relief or grants that would basically offset their price of attending our show. **That is a tremendous value for our members. We could not be happier. He was fantastic.**"

— *Mike Adamson, President & CEO The Aircraft Electronics Association*



"Gene, I would say in my 30 years of attending presentations, yours was THE MOST: **valuable, relevant, properly paced, perfect amount of info;** not too much, but enough, excellent humor, and **perfectly executed presentation** I have experienced."

— *Jill Keim, VP Relationship Manager, First Merchants Bank*



"**Gene was a huge hit again.** We have never brought a speaker in back to back years. Gene certainly was worthy and delivered again!"

— *Kevin Gilbride, Executive Director, The Accredited Snow Contractors Association*

Book Gene for your keynote or breakout session



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