



Lunch & Learn
Free with Registration

Financing, Transitions & Growth

**79% of Business Owners plan to EXIT their business in the NEXT 10 Years Only
17% have a written plan for succession.**

Information for Financial Advisors, Lenders, CPA's and Lawyers.

SPEAKERS

Stacey Mullinex

Senior Project Manager for the Iowa Center for
Employee Ownership at Advance Iowa

Audra Fisher
Anne McMahon

SBDC SSBCI Program
IEDA Business Development Manager

Steve Cruse &
Justus Robinson

Iowa Business Growth New Market Tax
Credit

Wednesday

August 12, 2026

10:30 AM - 1:30 PM

Audubon REC Center
703 Southside Dr
Audubon, IA 50025

Discussion Topics

- Business Continuity Planning
- Financial Analysis
- How to obtain a business valuation
- Finance Resources
- Available Programs

Register Now



SCHEDULE OF EVENTS

AUGUST 12, 2026
10:30 AM - 1:30 PM

10:30-10:45 AM



WELCOME

10:45-11:30 AM



STACEY MULLINEX

Succession, business valuation, and
planning

11:30AM -12:00PM



AUDRA FISHER & ANNE MCMAHON

SBDC Resources & SSBCI Program & IEDA Resources

12:00-12:30 PM



LUNCH

Lunch & Networking

12:30-1:00 PM



STEVE CRUSE & JUSTUS ROBINSON

New Market Tax Credit

1:00-1:20 PM



WESTERN IOWA ADVANTAGE

RLF and other resources

1:20-1:30 PM



QUESTIONS & CLOSE



MEET THE SPEAKERS

STACEY MULLINEX

SENIOR PROJECT MANAGER FOR THE IOWA CENTER FOR
EMPLOYEE OWNERSHIP AT ADVANCE IOWA



Stacy Mullinex is a Senior Project Manager for the Iowa Center for Employee Ownership at Advance Iowa, bringing over twenty years of business experience to the team. Her career has included owning her own company as well as consultation work for various trades which range from small family shops to multi-million-dollar operations. Her current role follows a similar path assisting companies in identifying value drivers for business growth, providing strategic/financial valuation assessments, and offering customized succession planning with a specialization in employee ownership models.

Stacy co-authored the textbook *Retaining and Transitioning Businesses in Communities*, contributing insights on using the worker cooperative model as a successful succession strategy in rural areas. She is also an adjunct instructor for the University of Northern Iowa teaching Entrepreneurship.

Stacy holds a Master of Business Administration, Public Administration PGC, undergraduate degrees in both Business Administration and Accounting, as well as a Certified Exit Planner (CEXP) designation.

AUDRA FISHER

SBDC – IOWA STATE UNIVERSITY

MANAGER OF CUSTOMER RELATIONS | CERTIFIED BUSINESS
ADVISOR



Audra Fisher serves as Manager of Customer Relations for the Iowa SBDC State Office, where she provides statewide technical assistance for Iowa's State Small Business Credit Initiative (SSBCI) program in partnership with the Iowa Economic Development Authority. With more than 20 years of experience in Extension and Small Business Development Center programs, Audra has worked extensively with entrepreneurs on financial analysis, marketing, business transitions, and access to capital. Over the past year, she has coordinated and participated in more than 41 SSBCI Lunch and Learn events across Iowa, helping small businesses connect with resources that support growth and success.

MEET THE SPEAKERS

Anne McMahon – Business Development Manager –
Iowa Economic Development Authority



McMahon's professional focus centers on fostering economic growth and supporting innovation within Iowa. She helps coordinate statewide business activities, encompassing expansion, development, and retention initiatives, while also managing and supporting federal innovation programs. Previously, McMahon played a key role at BioConnect Iowa, where they dedicated their efforts to assisting Iowa businesses in securing federal funding through the Small Business Innovation Research and Small Business Technology Transfer programs. This involved supporting small firms in their product development endeavors and enhancing their competitiveness for federal grants.

McMahon also brings experience in sales support and retail management. They served as a Sales Support Coordinator at The Minnesota Star Tribune and as a Store Manager at Hensley's Big and Tall Outfitters.



Steve Cruse – President & CEO Iowa Business Growth

JUSTUS ROBINSON – NMTC DEVELOPMENT OFFICER
IOWA BUSINESS GROWTH



Iowa Business Growth is committed to helping community businesses and community lenders throughout Iowa find the financing they need to make improvements to the business community. In 2021, we were recognized as the top SBA lender in Iowa by the Small Business Administration District of Iowa, and we take great pride in being an Iowa-based lender making community businesses better throughout the state.

Each member of our staff is eager to assist you in any of your economic development needs. We will gladly dispense advice, answer questions, or direct you to other sources of assistance. Our hope, however, is that one of our programs will be just right to solve your economic development needs. Contact our team to learn more about how we can help you.
