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Your World.**



# Case Study: A Post-Acquisition Autopsy, Mistakes Made; Lessons Learned

In this RMA OC Educational workshop, Jim Davidson provides an in-depth investigation into the warning signs for M&A lending.

## February Lunch & Learn

Thursday, February 27, 2025

### Lunch/Networking

11:30 - 12:00pm

### Program/Q & A

12:00 - 1:00pm

### Price

\$20 \* *Price includes delivered lunch during the workshop and validated parking.*

### Location

Comerica Training Room  
611 Anton Blvd #100, Costa  
Mesa, CA 92626

## Featuring Guest Speaker: Jim Davidson with Avant Advisory Group



**Jim Davidson**  
President & Founder  
Avant Advisory Group

**[CLICK HERE TO REGISTER!](#)**

Join RMA Orange County and Jim Davidson of Avant Advisory Group for a detailed workshop on the key takeaways from lessons learned post-acquisition. Learn how to effectively navigate economic uncertainty and seize emerging opportunities across sectors in the current M&A environment.

Topics discussed will be an overview of an example transaction, its red flags, and the misstated information that concluded in complications for the deal at hand.

Jim Davidson is president and founder of Avant Advisory Group, an operationally focused financial advisory firm. Jim has served in senior executive positions at both public and private companies. He served for 10 years consulting for Big Four CPA firm PricewaterhouseCoopers, and has now transitioned to the private sector.

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