

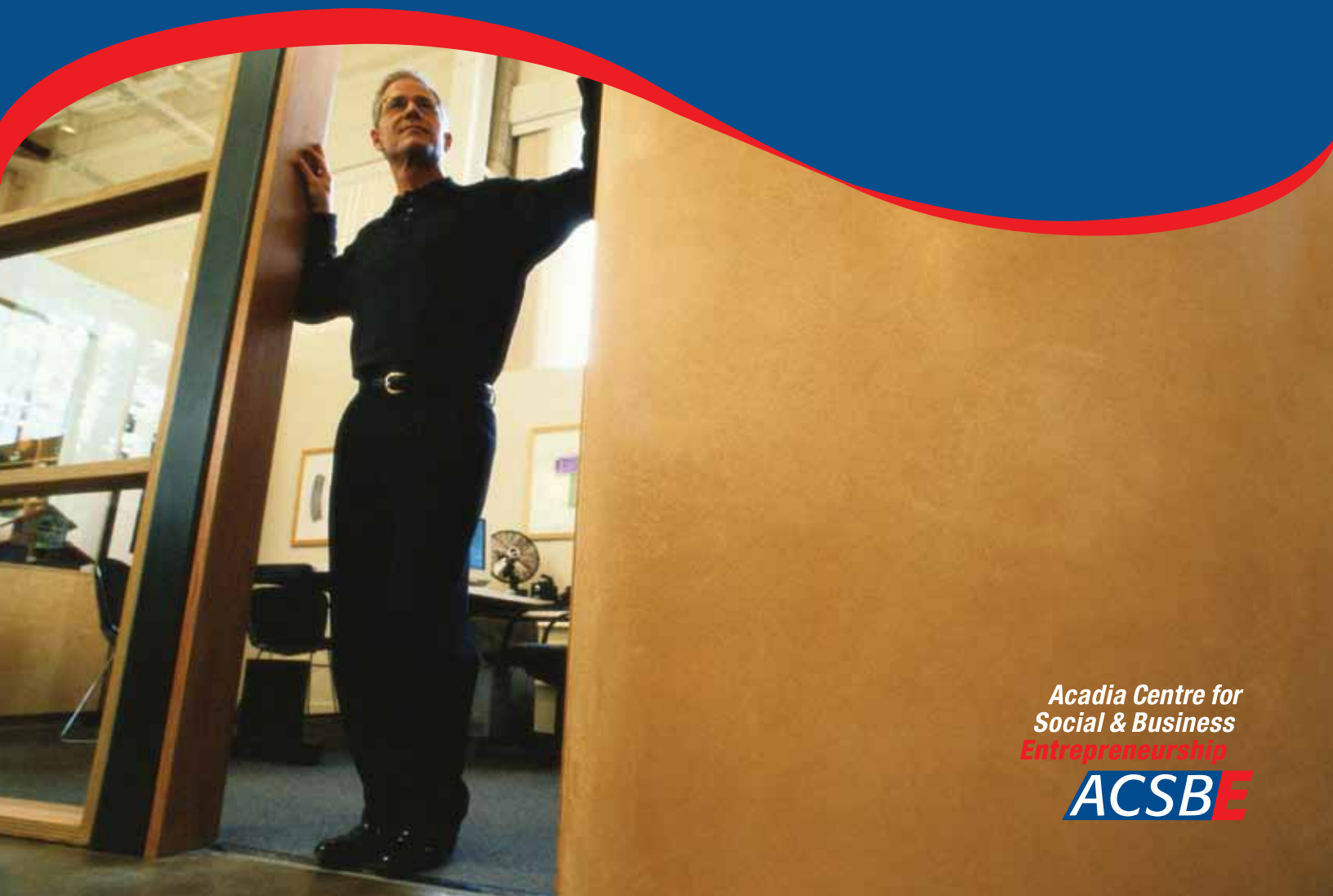
# Succession Planning

for Business Development Professionals

Anyone who owns a business is eventually faced with a decision about the life of their business.

A point in time will be reached when the entrepreneur leaves the business – by choice or by necessity - whether it be for retirement, health concerns or a variety of other reasons. And if it is the entrepreneur's desire for the business to live beyond their involvement, they need to have a solid succession plan to ensure the long-term success of the business.

The key to Succession Planning is advanced preparation.



# SuccessionPlanning

for Business Development Professionals

The topic of business succession planning is about as popular as planning for one's own funeral. Yet as business development professionals, we are keenly aware of the importance of being prepared and thinking ahead about the future of a business. Most of all, we want to convey to our clients that succession planning is best undertaken as a long-term process and to then assist them through what can feel like a succession maze.

Join us for a one-day journey through the business life-cycle that keeps the end in mind – Succession Planning for Business Development Professionals. We'll focus on integrating planning for succession into any phase of a business life. You will learn techniques and approaches to assist your clients to advance their succession plan through the lens of the legacy they wish to leave behind – and to design and implement a plan of action that will guide their business to the inevitable point in time.

*Attend this one-day session for **practical tools and techniques** that will enhance your capability to assist your clients develop a plan for the succession of their business.*

## The Succession Planning Program is designed to help you with:

- Succession planning options and strategies
- Potential successors – family and other options
- Legacy planning
- Financial and tax strategies
- Timing the transition

## Who Should Attend

Business Development Professionals (counsellors, consultants, and advisors) who work with small business clients helping them with all aspects of business planning from start-up to succession.

## Your Training Experience

Participants will be engaged in an interactive learning environment and will be given the opportunity to apply the theory taught in the workshop through group case studies. All participants will receive a toolbox of resources and will develop skills with practical and immediate application for everyday use with their clients.

## Training Schedule

- How to ease your client away from their business and get the most out of post-business life, while leaving a powerful legacy behind.
- The relationship between selling a business and personal financial planning.
- How to effectively pass on a business to a family member.
- How to prepare or 'package' a business for a profitable and seamless change of ownership.
- Strategies for reducing the tax burden of selling or passing on a business.
- Where to find people interested in purchasing or taking ownership of a business, including employees.

For more information: 1-866-654-4499, 902-585-1180, [acsbe@acadiu.ca](mailto:acsbe@acadiu.ca), [www.acsbe.com](http://www.acsbe.com)