

Succession Planning

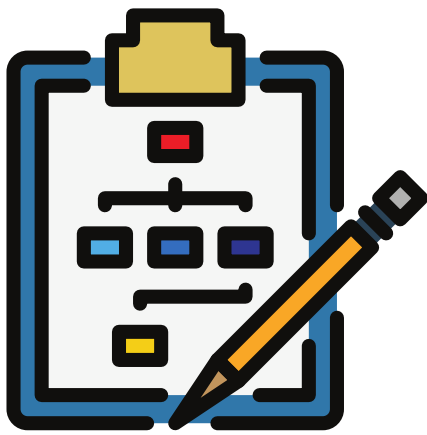
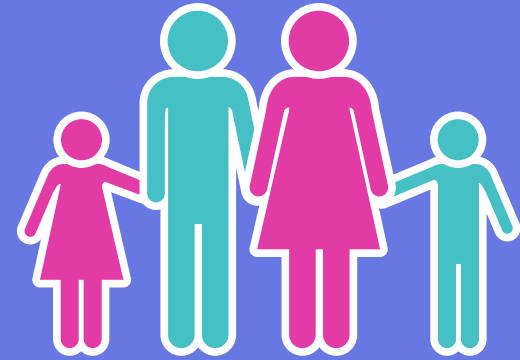
3 Critical Steps To Smooth Business Transition

Review The Family Business

Is business for family or income outcomes?

Size the business

Understand the family members and issues



Business Planning

Confirm the business structure is appropriate

Document the strategy including exit paths

Know the business KPIs

Scope The Issues Going Forward

Create a roadmap to solve the issues

Agree to a staged implementation and results

Prepare quotes for each stage



Family Business Support

Family Business Issues - You write them, We'll right them!

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