



SUCCESSION PLANNING: START TOMORROW'S PLAN TODAY

An interactive training session crafted to prepare participants to develop effective succession plans.

OBJECTIVES

Succession planning for Financial Services professionals is the vital and deliberate process of identifying and developing future successors to lead a practice or assume critical roles within in an organization. Succession planning helps teams develop team members, identify gaps in the team's suite of skills and craft a roadmap for team success.

Our training program is tailored to Financial Services professionals and will guide participants through the process so they can ensure the protection of clients and the future of the practice.

THE "SUCCESS" PLAN

We've broken down Succession Planning into an easy to follow "SUCCESS" Plan which includes the following:

- Understanding Succession Planning Issues
- Business Continuity Planning
- Successor Identification
- Individual Growth Plans
- Talent Development Structure

ADDITIONAL BENEFIT

- An added benefit of our program is that by implementing our succession planning framework you will gain information which will help you grow your business today.
- Protect your clients.
- Protect your business.