

# Build your own Succession Plan

A series of  
*roll-up-your-sleeves*  
workshops for entrepreneurial  
and family businesses.

*Build an integrated  
succession plan that  
both protects the assets  
and strengthens the  
family and/or  
partner connection.*

Every entrepreneur will one day sell his or her business to either someone inside the business or family, or to an outside party. The SuccessCare Program's mission is to help all business owners have **more choice** around how and when they exit while engaging their heirs or successors in the process.

**Build your own Succession Plan** is an in-depth experiential-learning program designed to develop a **we focus** and ultimately groom next generation shareholders and directors of the business or family office.

From this program, participants will be better positioned to:

- Enhance the foundation of an integrated succession plan with stewardship, leadership and trust.
- Create an exit strategy that ensures maximum choice.
- Enhance the communication that is the key component of a successful transition.
- Implement an effective governance structure for the preservation of all assets.



## Engaging Experiential Enlightening

Succession implies retirement and retirement means to take something out of use. Not a picture that excites many business owners.

*Build your own Succession Plan* is a fun, roll-up-your-sleeves program that instead focuses on a transition to a bigger future that engages both the current and future generations.

This program is designed to help your family design its own transition plan that can get you quickly across the *Line of Confidence* to the *Initiation Stage* where together you can build the foundation for that bigger future.

You will leave with the knowledge and skills to move into the *Implementation Stage* with more effective communication and decision-making structures for the next generation leadership.

## Go Beyond the Financial

Traditional succession plans focus on distributing the wealth and/or transferring the shares of the business.

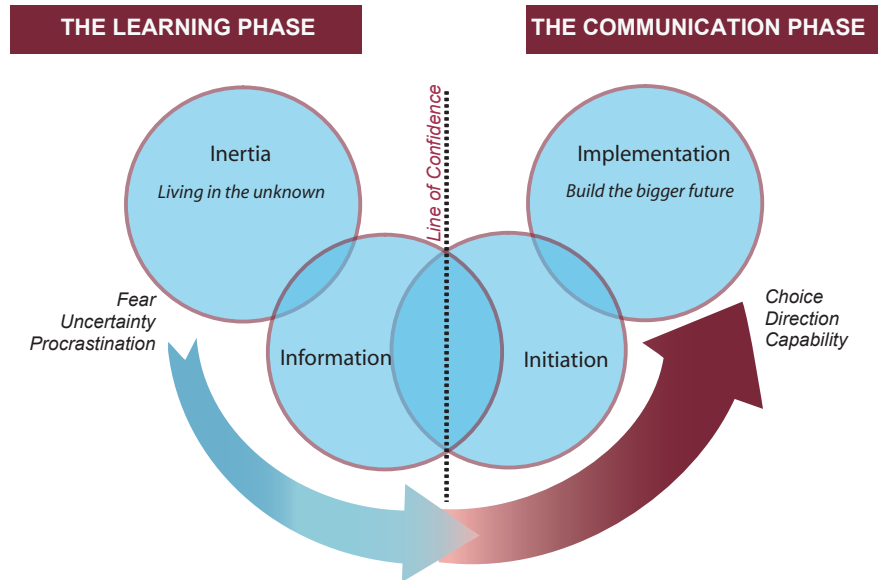
Some go a step further to look at how the authority to lead and make decisions passes to the next generation leadership.

But an integrated transition requires greater communication to ensure the purpose, passion and relationships are not lost in the process.

The SuccessCare Program teaches business families and their advisors how to build a “we focus” – with a strong foundation of stewardship, leadership, and trust – that will guide the next generation and enhance the likelihood of a successful transition.

## Build your own Succession Plan

### The Line of Confidence™



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## Who Should Participate?

*Families who want to create a legacy or build their family heritage.*

*Families who want to have more control over the future direction of their business.*

*Families who lack the time or knowledge to develop an integrated succession plan.*

*Families who want a structured and focused approach to succession planning.*

*Families who want to recognize the barriers to a successful transition.*

*Families who need to better understand how family relationships might impact the succession process.*

*Families who want to strengthen internal relationships and enhance communication.*

*Families who want to know how to manage differences or conflict.*



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## Highlights

**Save \$435**

*when you register for the full program*

**\$1,950 for 3 days or \$795 per day**

Register online at [successcare.com](http://successcare.com)

### Day One

**Moving ahead with confidence**

**Discover the obstacles to a successful transition and our tried-and-true approach for managing the complexities facing families in business together.**

*You will move through the **Information Stage** to cross the **Line of Confidence** with an integrated plan that can not only manage the inevitable roadblocks but also deliver maximum choice for the future of your family and business.*

### Day Two

**Building a strong foundation**

**Take the steps required to meet the objectives of the family, ownership and management areas of your business under the next generation leadership.**

*You will enter the **Initiation Stage** and begin working on the strategies that will build the stewardship, leadership and trust required for a healthy business and connected family group.*





### Day Three

**Implementing the integrated plan**

**Design the structures that are required for ongoing protection of the family assets and/or viability of the business while at the same time maintaining a healthy family unit.**

*You will utilize the components of the communication vehicle that is essential for safe passage through the **Implementation Stage** and beyond to lay the groundwork for an effective governance process for the next generation.*

#### Program Format

-  *Workshops run from 8:30 am to 5:00 pm daily.*
-  *Sessions includes a combination of instruction, multimedia presentations, case study work, and small group and individual exercises.*
-  *High quality course materials include practical notes and reference material.*
-  *Lunch and refreshments provided.*



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