



TRANSITIONING YOUR BUSINESS “NOW OR FOREVER”

A Workshop Focused on Integrating Your Business
Transition Into Your Lifestyle

*Helping entrepreneurs and self-employed professionals grow and transition
their business within an integrated lifestyle planning approach.*

AGENDA

- ✓ **Integrating your Business Transition into your Lifestyle:**
What are the lifestyle considerations that are important to you in order to integrate them into your transition plan.
- ✓ **Attracting the Right Successor to your Business:**
Develop a list of the key characteristics of the right successor for your business.
- ✓ **Matching – Finding Candidates for your Business:**
Learn how to find someone who will complement you, your business and your clients.
- ✓ **Selecting your Successor – The Art and Science of Selection:**
Learn how to make the right decision on the right person using an integrated selection approach.
- ✓ **Final Game Plan:**
Walk away from the workshop with a plan you can execute to ensure you transition your business in the right way with the right people.