



SUCCESSION PLANNING

Developing a positive succession outcome for your family and business

FEATURES

Our Succession Planning service provides you with:

- A comprehensive discussion between all of your business stakeholders regarding the needs, wants and goals of everyone involved
- A full review of business performance including financial and enterprise performance
- A review of the roles and responsibilities family members have in the business and how they will be structured in the future
- A review of your business structures and individual's insurances and wills
- Action planning so that realistic goals and achievements can be set for the business and family members

You will also receive:

- Access to a range of tools to help your family plan for and engage in succession planning
- Post meeting telephone support, to ensure your action planning is progressing and that the process doesn't stall.



“

The family found the process interesting and rewarding. It opened their eyes to how our business runs and what goes on behind the scenes of running the farm. We now have a structure that we can follow and implement and make life a lot easier for everyone.

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Jo Starkey, Palmer SA

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BENEFITS TO YOUR BUSINESS

- Communicate and understand the wishes and goals of your family members
- Understand the financial viability of your business
- Review your business structure, insurances and wills
- Develop a realistic action plan to achieve positive succession outcomes
- Keep your succession plan rolling through access to telephone support

We work with family businesses seeking the first step in succession to encourage communication and help develop succession outcomes. We have a succession planning process that supports you through the steps, which is like having an advocate by your side through an often challenging time.

We have been working through succession with family businesses for over 15 years, and understand the issues family businesses face when trying to create fair succession for all family members. Your family members can openly discuss their goals and aspirations. With the help of an experienced facilitator, you will review your business position, its structure and develop an action plan to progress the discussions.

We can provide you with an independent perspective and a process to enable the succession plan to progress, as well as ongoing support to ensure your succession planning doesn't stall. So, why don't you let us help you and your family prepare for succession?

WHY WORK WITH US

We have been working as an independent consulting business with family businesses for over 20 years, helping families discuss succession and assisting them to develop tailored succession plans. We believe that succession planning should be integrated into the everyday management of the business and should occur well before a major change occurs. As a result, we not only look at fair outcomes for all family members, but review your business position, performance, structures and legalities to ensure the whole business is on the right succession path.

For more information
contact us on **1300 746 466**
or visit **pinionadvisory.com**

