

Build Your Own Succession Plan Seminar



An Interactive Program geared to expand your knowledge of Succession Planning

CEC's: 5 General ICM per Day

Series Dates:

Day 1 – Nov 3, 2015

Day 2 – Nov 16, 2015 &

Day 3 – Nov 17, 2015

\$575.00 for Day 1 only

or

\$1650.00 for all 3 days

(GST Included)

8:30am – 4:30pm

(Lunch will be provided)

IBAM Office

600-1445 Portage Ave

Presenter: Daphne McGuffin, Program Director, The BDO SuccessCare Program

joined the SuccessCare Program in 1999 to develop and deliver learning opportunities that help business owners and their families gain the confidence they need to prepare for the inevitable transition of their operation. In addition to a career in adult education that spans three decades, she has an advanced certificate in family business advising from the Family Firm Institute. As a certified Kolbe consultant, Daphne assists business in developing greater synergy and productivity within their team.

Program Overview: This seminar series is an enlightening and engaging roll-up-your-sleeves workshop that focuses on preparing for a transition to a bigger future – one that ensures you have greater choice around how and when you eventually exit.

Discover a tried and true process for creating an integrated transition plan that will not only protect your equity but strengthen the business unit and meet the needs of all your stake holders.

Brokers and their key stakeholders are encouraged to attend to work through real life challenges and questions that your operation is facing. **For more information on the daily objectives, please see Program Summary page.**

Name:	_____
Brokerage:	_____
Address:	_____
Phone:	Fax: _____
Email:	_____
Full Series: <input type="checkbox"/>	or Day 1 only: <input type="checkbox"/> and/or Day 2 & 3: <input type="checkbox"/> Day 2 & 3 attendees must have completed Day 1
Please find payment enclosed of \$ _____	Method of Payment: Cheque <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/>
Credit Card Information: _____	Expiry: _____
Signature: _____	Date: _____

PLEASE NOTE: All registrants will receive the contact information at least 24 hours before the start of the Webinar. If you are not notified 24 hours before the webinar begins, contact the IBAM office immediately. Keep a copy of this registration as a reminder.

Send applications to:

Mail: IBAM, 600-1445 Portage Ave, Winnipeg, Manitoba, R3G 3P4

Email: katrinahueging@ibam.mb.ca

Fax: 204-489-0316

Non-members add \$50.00 for Day 1 only or \$150 for Full Series. Fees include a non-refundable amount of \$20.00. No REFUND if cancelled within 7 days of seminar, or if a "No Show". Admittance by Pre-Registration only. Applications are processed on a first-come, first-served basis as payment is received and all seminars are subject to minimum attendance requirements.

A \$20.00 administration fee applies to all returned cheques.

Office Use Only – ACC: _____ By: _____

Day One Objectives

- Explore the *critical components* of an effective transition plan with a viable exit strategy
- Learn how to *avoid the typical roadblocks* to a successful business transition
- Clarify the *differing objectives* for the *three key areas* of your business
- *Identify* the *potholes and roadblocks* that are specific to your situation
- Practice the techniques for *getting alignment* among key stakeholders and addressing differing expectations
- Develop a *game plan* for the inevitable transition of your business



Day Two Objectives

- Inventory the *three groups of capital* that are essential to a saleable business
- Initiate the *steps for building and enhancing the social capital*
- Consider ways to *protect against an involuntary sale* while avoiding the golden handcuffs
- Explore *the good, the bad and the ugly* of a *management transition process*
- Review tools and techniques for *identifying and grooming a successor*

Day Three Objectives

- Continue the examination of tactics for *building and enhancing the social capital*
- Practice techniques for *enhancing communication* among stakeholders
- Explore *the role of governance* in transitioning the privately-owned business
- Review the benefits of an Advisory Board and other *communication structures* in *grooming the next generation* of leaders, shareholders, and directors

PURPOSE OF THE PROGRAM

To expand your knowledge of the succession planning process as well as to address the lack of alignment that is the root cause of failed transitions. Participants will experience increased confidence around planning your exit as you will now know practical steps for developing an integrated business transition plan

The process is interactive and experiential while providing a unique and productive mix of instruction, multimedia, and small group work that enhances the application of knowledge:

- Explore real-life experiences through a video case study
- Roll-up-your-sleeves and practice using our “napkin” tools
- Experience the process through individual exercises and small group activities

WHY IS THIS PROGRAM SUCCESSFUL?

The BDO SuccessCare Program is an experiential-learning program that works on an exit strategy that ensures maximum choice for brokerage owners while engaging next generation shareholders and directors. This will enhance the communication that accounts for 80% of a business transition plan as well as help brokerage owners to work together with key stakeholders to build on a foundation of leadership and trust which leads to an effective governance structure for the preservation of three types of capital in the business.