

INSPIRED

ACCOUNTANTS

Succession Planning

Succession Planning is about clarifying what you want for the future and defining the steps required to turn that vision into a reality, while taking into consideration business, personal and family expectations.

All business owners should have a Succession Plan in place. Whether you plan on exiting in three years or 30 years, it's important now. It's not just about extracting maximum value from your business to provide for your future. Should an unforeseen event occur, lack of planning will cause unnecessary stress and potentially compromise your sale price, client relationships and the overall reputation of your business.

We will facilitate a half-day one on one Succession Planning session where you'll define your goals and objectives with respect to your eventual exit from your business. You'll complete pre-work prior to the session to identify any burning issues so that we can prepare accordingly. During the session, we'll work with you to create a concise Succession Plan to guide you through this process. We will help you:

- √ Determine what you want out of your business
- √ Clarify your succession options
- √ Identify the key people involved
- √ Ascertain the timeline and key milestones for your Succession Plan
- √ Clarify the various personal, business, financial, legal, and taxation aspects you need to consider
- √ Identify the actions and strategies you need to take to make your objectives achievable

Why choose Inspired?

We love seeing our clients succeed, working with them to create a successful business is what we do!

We work with large and small clients and everything in between! We know what you need to get set up, how to run a successful company and how to exit the business when the time comes.

We are a team of 5 who work in a virtual environment. We can meet at a place near you, over the phone and online.

Our core values are Honesty, Openness, Great Relationships and Fun.

Come and experience the difference!

Inspired Accountants... Inspiring great outcomes!



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