

# SUCCESS IN SUCCESSION™

An Exclusive Program for Founders/Owners & Next Generation Owners/Partners

## PROGRAM MISSION

The mission of the **Success in Succession™** program is to help Founders/Owners better clarify succession goals and challenges, and prepare their Next Generation Owners/Partners (NGOs/NGPs) to eventually take the reins.

## ELEMENTS & TIMELINE

### Workshop Pre-work

ClientWise to send by the end of May

### LIVE! 2-Day In Person Workshop

ClientWise Office & Training Center  
5215 N. O'Connor Blvd, Irving, TX 75028  
(800) 732-0876 Ext 304

#### Time and Schedule:

**June 15, 2021**

10:00 a.m. CT - 5:00 p.m. CT

**June 16, 2021**

8:00 a.m. CT - 3:00 p.m. CT

*All travel and accommodations are the responsibility of the participant*

### LIVE! 3-Day Virtual Workshop

Zoom information will be provided

#### Time and Schedule:

**June 23, 2021**

12:00 p.m. CT - 4:00 p.m. CT

**June 30, 2021**

12:00 p.m. CT - 4:00 p.m. CT

**July 7, 2021**

12:00 p.m. CT - 4:00 p.m. CT

## PROGRAM LEARNING OBJECTIVES & TOPICS

### Founders/Owners Learning Objectives

- ▶ Learn what they seek to design in terms of a succession or will have checked in on what they have already designed.
- ▶ Design what value they seek to realize on their practice at exit.
- ▶ Complete a current state analysis, including understanding the valuation drivers, and identify the gaps that need to be closed.
- ▶ Know whether equity ought to be granted, discounted, and/or bought and by whom.

#### Topics

1. Designing a Fulfilling Retirement
2. Designing What the Practice Gives You Until Exit
3. Imagine the Exit Perfectly
4. What Value Do You Want to Realize?
5. An Overview of the Steps/Needs for Succession
6. A Current State Analysis of Your Practice from a Succession Perspective
7. A Basic Valuation Analysis
8. What are the Gaps?
9. Core Issues to Be Addressed to Create the Perfect Exit
10. Just Because You Can, Doesn't Mean You Should

### Next Generation Owner/Partner Learning Objectives

- ▶ Know what they want for their future.
- ▶ Know what it takes to be a partner and owner.
- ▶ Understand what the path to partnership and ownership involves.
- ▶ Know their expectations of the Founder/Owner and themselves while on that path.
- ▶ Complete a current state analysis and identify gaps they need to close.

#### Topics

1. Designing a Fulfilling Future
2. Designing What the Practice Gives You Now and In the Future
3. What Being a Partner/Owner Means
4. What Value Do You Want to Create on the Way to Succession?
5. An Overview of the Steps/Growth for Succession
6. A Current State Analysis of Your Growth Needs from a Succession Perspective
7. What are the Gaps?
8. Conviction and Alignment of the Firm's Value Proposition
9. Your Expectations of Your Founder/Owner and any Gaps
10. Core Issues to Be Addressed to Create the Perfect Succession



GET CLEAR. GET FOCUSED. GET RESULTS.™

**For information and fee structure:**

[info@clientwise.com](mailto:info@clientwise.com) or 800.732.0876 ext. 501

**Enroll Now:** [clientwise.com/succession](https://clientwise.com/succession)