

BEFORE BEGINNING YOUR SUCCESSION PLAN

ASK YOURSELF
THESE QUESTIONS



WHAT'S MY VISION FOR MY COMPANY?



1. What's your vision for the next generation of your company and its stakeholders?
2. Are there any individuals who could manage your company after your exit?
3. Have you developed, codified, and shared your succession plan with stakeholders?
4. Have you identified possible successors within your firm?

WHAT'S MY PERSONAL VISION?



1. What are your personal goals for the company?
2. What makes you apprehensive about creating a succession plan?
3. What role do you see yourself playing in the future of the company and for how long?

WHAT'S MY VISION FOR MY STAKEHOLDERS?



1. What are your clients' expectations about working with you over the long term?
2. During my next audit, will the regulators approve of the succession plan?
3. How important do you feel a succession plan is in the eyes of your clients, family, and employees?
4. Do I have an orderly transfer plan in place? Who will enact it?
5. Does my strategy serve my clients' best interests?

CONTACT WINTHROP PARTNERS TODAY FOR HELP WITH YOUR SUCCESSION PLAN

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