

Business Succession Planning Workshop

This one day, hands-on workshop has been designed for Advisers who want to help clients put exit plans in place or perhaps just want a more in-depth knowledge of business succession planning.

Topics covered include:

Scoping the clients' exit needs and mapping structural issues

Involuntary & voluntary departures - planning & implementation issues

Forced departures - planning & implementation issues

Needs analysis for insurance funding purposes - type of cover & trigger events including trauma cover issues, amount of cover - business value, debt cover, tax underwriting issues

Financial & legal Issues - business value, payment terms, managing debt repayment, options & option periods, purchase price & CGT, premium pooling, managing insurance under-funding, partner sub-groupings.

At the completion of the workshop you will be able to prepare a business succession plan that outlines the client's circumstances, needs and some suggested solutions. This will provide the basis for you to deliver a brief to a lawyer to help facilitate the drafting of business succession agreements for the client. It will also help you prepare an insurance needs analysis if required as a funding mechanism.

The workshop is designed to be interactive and participants are invited to bring along their own case studies.

Workshop Details

The **Financial Planning Association of Australia** has accredited the Irongroup Lawyers Business Succession Planning Workshop with **8.25 CPD points**. For **Accountants**, the workshop time is **7 hours**, excluding breaks.

When: For latest dates refer www.irongroup.com - see Training section

Where: Irongroup Lawyers, Level 8, 533 Little Lonsdale St. Melbourne

Who should attend: Any Advisers wishing to understand more about business succession planning and who want to help their clients put exit plans in place including insurance as a funding mechanism. No prior knowledge required.

Workshop Fee: \$1100 inc gst. An Irongroup Lawyers Business Succession Planning manual is included in the fee.

Bookings: Book now to reserve your place. Call 03 8621 9000 or email training@irongroup.com