

Why is business protection and succession planning important?

Business protection and succession planning ensures that ...

The assets of the business are protected

eg lf debts are secured by assets, have personal guarantees been considered?

Asset (Debt) Protection

The revenue of the business is protected

eg Would the loss of a key employee result in a loss in revenue?

Revenue Protection

The ownership of the business is protected

eg Would the loss of an owner result in a loss in business value?

Ownership Protection

The key to good protection is the right amount of money, for the right person, at the right time.

How does the facilitation process work?

As facilitators we will work closely with your team of advisers (accountants, lawyers etc) to coordinate a business protection and succession plan specifically tailored to your business. Our unique process allows us to coordinate funding and legal solutions in a timely and cost effective way that ensures you can focus on what you do best—running your business.



What is the business protection and succession planning process?

First meeting

Explain	Discover	ldentify	Present	Implement	Explain
and	and	and	and	and	and
Educate	Accumulate	Clarify	Prepare	Initiate	Educate
As facilitators we invest the time to make sure you understand the key issues and why they are important.	Our unique audit process allows us to obtain the information required in a timely manner.	Using our discovery checklist we will quickly identify and clarify what needs to be done.	We will present you with an easy to understand report on the issues identified along with a plan of action including all costs.	As facilitators we will coordinate the implementation of your plan and initiate what needs to be done with the relevant professionals.	Once your plan is in place we will review it with you to make sure it meets your objectives.

Our process will minimise your time

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