

Succession Planning for Small & Medium-Sized Manufacturers



When & Where:

Wednesday, May 15th
10:00 am - 2:00 pm

(9:30 am Check-in)

Executive lunch provided

MAST

512 Falconer Street
Jamestown, NY 14701

Cost:

\$50.00 per person to
hold your spot

Reimbursed upon attendance

Seating is limited
with first priority
to manufacturers.

Registration:

716-636-3626



EISNERAMPER

Practical and interactive workshop in which participants will learn about and develop an initial transition and succession plan for their business.

Workshop Objectives:

Explore the key elements of an effective succession plan, including:

- How and when to transition out of your company.
- How to identify and groom a successor.
- What to do if no successor exists or no one is ready for the role.

Discuss the various steps that any family-owned or closely-held business owner should undertake to plan for their future, including:

- Key components of an exit strategy.
- An effective succession plan.
- Incorporating the family plan into the business plan.
- When to consider outside management or other options for non-family management of the business.
- The importance of estate and financial planning.
- How to build your bench and increase your company's value and future stability.

At the end of this session, participants will have a draft plan to discuss with the rest of their family, management team or professional advisors. Participants will leave the workshop with examples, case studies and practical tips for continuing to develop, finalize and implement their plan.

About the facilitator:

Matthew Kerzner is a Senior Manager at the EisnerAmper Center for Family Business Excellence. Matt has more than 25 years of experience in organizational development with a specialization in assisting family businesses and closely held businesses with addressing transition, financial stability and sustainability, and human performance management matters.



Matt works with clients developing a strategic plan that acknowledges the issues and dynamics of both the family and the business in order to develop succession plans that prepare the next generation leaders to succeed.