

MULTIPLE OWNER FAMILY BUSINESS **SUCCESSION PLANNING PROCESS**

PHASE 1	PHASE 2	PHASE 3	PHASE 4
Current Planning Analysis	Design Opportunities	Implementation Actions Taken	n/ Summary & Review
Current Planning Analysis includes:	Planning Opportunities Design includes:	Implementation includes:	Annual Review includes:
+ Core Business Values identified	+ Modeling alternatives	+ Project Management	+ Summary of actions taken
 + Core personal values, goals and objectives + Exisiting Plan: documents, value, trigger points, funding 	+ Tax Consequences + Filter + Buy/Sell Checklist	+ Drafting + Review integrating values, goals and objectives	+ Compare values, goals and objectives to documents + Open Items
 + Roadblocks + Catastrophe plan + Current valuation methodology growth rate + Ownership %'s of key executives 	+ Valuation	 + Understand + Sign Documents + Match funding for current/future value + Communicate to appropriate advisors and key managers 	+ Reasons for changes
+ Analysis + Opportunities			

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