



Succession Planning

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A Business Succession is often likened to passing on a baton.

A highly trained athlete has undertaken hours of preparation to be at his peak at this moment, ensuring a seamless handover while sprinting at high speed. Both runners have the technique mastered to perfection, knowing exactly how the baton is to be placed in hand and how it must be received. Complete focus is required to execute exactly as planned. Once the baton is safely in hand, focus shifts to making ground, while being ready to ensure the next handover is just as smooth.

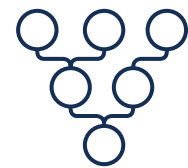
Like a relay race, execution of the family business handover could make the difference between winning or losing.

UBTA has developed a program in conjunction with UBT that is tailored to the Community. We take a structured approach to work with you to develop a family business plan for your business and family and refine the talent that you already have.



Family Business

World's largest source of long-term employment, yet only 12% pass onto 3rd generation.



Analysis

Next 30 years intergenerational wealth transfer of \$2.4T

Our process

Initial Review	
<p>The initial review is a current state review of business operations, structure and ownership.</p> <p>A comprehensive deep-dive survey of family members, key stakeholders, management and advisors is taken, then collated into graphical form and sent to all participants.</p> <p>The information is then assessed and UBT consultants are selected on the basis of our understanding of requirements.</p>	
Workshop Sessions	
Workshop sessions draw out the unique aspects of your business that need to be addressed	
Session 1	<p>Overview of survey is presented and the participants use the developed process to work through key aspects of their business: Strategy, Capital and Governance.</p> <p>At the close of this session there will be an action plan and development of a draft family business charter.</p>
Session 2	<p>The second session will be a review of the progress and overview of the charter and how it addresses the matters identified in the first workshop.</p>
Instruction Set	
Refining and presentation of a series of documents to assist in preparation of	
Family Business Charter	<p>A document setting out the family business governance system and the relationship between the business and the family. A draft document provided as a result of the process for your team to continue to develop.</p>
Assisting your Professional team	<p>The draft family business charter can be supplied to legal professionals to assist in preparation of shareholder agreements, dividend policies and for estate planning purposes. UBTA are able to assist in this process to ensure the best outcomes for your business.</p>



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