DELAWARE SOCIETY of CERTIFIED PUBLIC ACCOUNTANTS

# Succession Planning

## *Webinar Series*

## Succession Will Happen – Make Sure It's on YOUR Terms

**Join Lon Goforth, one of the country's premier experts on CPA firm successions, mergers and acquisitions, for these special one-hour CPE webinars offered through CPA Crossings, LLC.**

**From determining your value to solving key integration issues, Lon will help you navigate through the succession planning process.**

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### Succession Planning for CPA Firms: When, How and With Whom?

A review of many considerations that are critically important when thinking of succession planning: culture, opportunity, value, staff, clients and, last but not least, you and your legacy. This session will speak to the 'do's and don'ts" and the "why's and won'ts" of succession planning.

### 2-Phase Deal: The Perfect Succession or Acquisition Solution

Learn why the 2-Phase Deal is the best method of acquiring or transitioning your firm. We will examine this deal structure from three different vantage points: the acquiring firm, the succession-minded firm and the client.

### Practice Value & Evaluation: What is My/Our Practice Worth?

What are the 5 major variables to determining practice value? What are the 12 key contributors to value determination? What is the impact on value of certain internal or external factors? These will all be discussed to help you with determining the value of your practice.

### What is the "Realization Rate" of Your Firm's Future Value?

Everyone wants to know the answer to the question, "What is My Value?" Whether you are interested in determining value for sale, succession, transition, acquisition or merger, learn about the many different drivers and contributors to both individual and practice value so you can take control of both value and outcome.

### Key Integration Issues That Inhibit a Successful Merger

The success of financially solid and well planned mergers is often diminished because of poor execution. This session will look at the common and no-so-common integration issues that interfere with mergers realizing their full potential.

### Due Diligence & Documentation When Merging CPA Firms

Many key areas of due diligence are often overlooked or not given proper attention when two firms are considering a merger or affiliation. Learn the seven major areas of due diligence that should be carried out for maximum value recognition and realization.