

Family Business Succession Guide

Synopsis

Family Business Succession Guide provides a practical approach to family business succession planning. The book is an essential guide, not only for advisers to small business, but for SMEs themselves. Written in a clear and concise style, the guide looks in detail at the tax issues surrounding succession, but also provides an excellent guide on management succession (eg the board, future business leaders, employing family members), and equity succession for family businesses (eg structures, form of transfers, buy-outs, asset protection, estate planning).

Containing many practical examples, checklists, diagrams and case studies, direct from the author's first-hand experiences, this guide outlines the practical process that can be used for a succession planning assignment together with the questionnaires, a family meeting agenda and index for a family business constitution.

Family Business Succession Guide also includes a CD-ROM containing planning checklists that can be used as templates by advisors and SMEs themselves to ensure they get off to a good start on succession planning. These checklists cover issues such as getting started, working with a family business facilitator, developing a family participation plan, preparing a management development plan, and the steps involved in grooming a successor. The CD also includes other templates and forms covering, for example, Objectives of the Family Business, Management Philosophy, Agenda - Family Meeting, Family/Business Interaction, and Family Values.

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