

# Succession Planning: Leveraging the Investment of a Lifetime

## Plattsburgh

Thurs., September 15

## Watertown

Friday, September 16

### Time:

1:00 - 1:30 PM sign-in & networking

1:30 - 5:00 PM workshop

### Cost:

\$50/person

### Registration:

Sign up early to ensure your attendance at this valuable workshop! Registrations will be accepted until close of business on Monday, September 12th.

To register, provide the name, title and contact information (address, phone and email) for attendee(s) . . .

**online** [www.citec.org/training.html](http://www.citec.org/training.html)

**email** [newvine@citec.org](mailto:newvine@citec.org)

**phone** 315-268-377 x21

### Presented in partnership by:



Nearly 65% of all small businesses in the U.S. will attempt to transition to the next generation of ownership in the next five years. Statistics show that, without help, more than half will fail.



Lisë Stewart

**Leveraging the Investment of a Lifetime** will help business owners understand what they can do to ensure a positive return on their family-owned or closely-held business.

- Ever wondered what you are going to do with the business you built?
- Are you curious about the value of your business and whether you'll ever realize a return on your investment?
- Are you depending on your business to fund your retirement?
- Are you wondering if you have the right successor, or ANY successor in place to take over the business you worked so hard to create?
- Do you worry about how you might be able to leave your business someday while protecting the jobs that your company provides?

Join Lisë Stewart, a popular speaker, author and nationally recognized expert on family-owned businesses as she shares 7 important tips for ensuring that the business you built can become a source of financial security, a vehicle for leaving your legacy and an opportunity for continuing to create jobs for the people you care about in your local community.

Using humor, case studies and common sense, Lisë will provide a wealth of tips and ideas to implement in your own business, as well as provide information on where to find the resources you may need to reach your goals.

### Expert Panel Discussion:

Improving business value Q & A. This group will address a range of tips that business owners can use to build their company's value, productivity and long-term sustainability.