

Fundamentals of Succession Planning



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1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

FUNDAMENTALS OF SUCCESSION PLANNING

The objective of this course is to provide an overview of the fundamentals of succession planning, enabling advisors to understand the key concepts in this important area and assist clients in developing a succession plan for their business. This course is designed in a practical format and will help an advisor become a valuable resource to their clients in the succession planning process.

CONTENT DESCRIPTION & KEY CONCEPTS

Key concepts include understanding the importance of succession planning for the business and key positions within the business; role and financial issues, from both the business leader and successor perspective; succession plan implementation; addressing the impact of succession on employees and the business as a whole; and succession of the business to third parties.

CERTIFIED SKILLSETS YOU WILL LEARN

This course will enable the student to:

- Understand the importance of the planning process, and how it is an important precursor for succession planning
- Differentiate and understand the relationship between succession planning for key positions and for the business as a whole
- Coach business leaders/potential successors as to the role and responsibility issues they should consider in succession planning
- Identify the key financial issues that business leaders/potential successors should consider when conducting succession planning
- Understand the key aspects of succession planning implementation
- Assist clients in times of problems in the implementation process, including a failed succession attempt
- Assist a business leader in understanding the options and process for pursuing succession to a third party

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

TABLE OF CONTENTS

- 1 Introduction to Succession Planning
- 2 Essentials of Planning and the Planning Process
- 3 Key Positions that Require Succession Planning
- 4 Role and Responsibility Issues for Business Leaders
- 5 Financial Issues for Business Leaders
- 6 Role and Responsibility Issues for Successors
- 7 Financial Issues for Successors
- 8 Succession Plan Implementation
- 9 Succession of the Business to Another Organization
- 10 Succession Planning: Specialized Situations

Study Time: 30 hours

STEP 1: STUDENT IDENTIFICATION

Name	Returning Student ID #
<hr/>	
Company	
<hr/>	
Address	
<hr/>	
City	Province
<hr/>	
Postal Code	Email
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Phone with Area Code	Fax
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Referred By	Current Designations/Licensing

STEP 2: TUITION FEES

- Single Course Tuition Fee** **\$795**
- Electronic Textbooks** **No Extra Charge**
- Hard Copy Textbooks and Delivery** **\$ 75**
- OR**
- Choose Certified Skills Diploma or Designation Program and save up to 31%**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

STEP 3: PAYMENT PLANS

- Full Payment Plan** (Branch Office study groups save 10%):
Number of Courses: _____ A x fee from Step 2 = B below
- | | |
|-------------------------------------|------------|
| TOTAL TUITION FEES: | \$ _____ B |
| Hard Copy and Delivery (see step 2) | \$ _____ C |
| SUBTOTAL (B + C) | \$ _____ D |
| GST/HST (885004713RT001) | \$ _____ E |
| TOTAL DUE (D + E) | \$ _____ F |
- EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

- CREDIT CARD:** Visa MC Amex Expiry Date ___ / ___
- Card Number _____
- Name on Card _____
- Signature _____

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

- Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.