

HOSTED BY CRRC

# Succession Planning WORKSHOP

TUESDAY, APRIL 10, 2018 | 1 - 4 PM

Succession Planning is as much or more important than your day-to-day operations or monthly financial statement. Especially for those who intend to keep their business in the family. It takes a solid team to guide any company to plan and implement the goals of owners and family, and to avoid legal, financial and tax pitfalls along the way. This introductory workshop will help you explore options that are available and define a "best case scenario," whether that's to keep it in the family or sell to an outsider. You can expect lots of Q&A during this interactive workshop.

## Topics Include:

- Why Plan for Succession?
- The Succession Planning Process
- Strategies and Tools in Succession Planning
- Identify Your Goals
- Next Steps to Plan Succession

## Presenters:

**Mike Murray**, Napa Recycling & Waste Services

**Tom Barry**, Green Hasson Janks

**Jasun Molinelli**, Archer Norris

**John Cordeiro**, Vintage Wealth Advisors

Available  
via webinar!

See reverse  
for details

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## Cost

**\$100** | Next Generation Alumni are invited at no charge.

**Can't be there in person?** CRRC workshops are most effective when participants attend in person. However, you have the option of viewing the workshop via live feed or a recorded version.

**Your cost for this option is \$50.**

## Location

The DoubleTree Hotel Berkeley Marina | 200 Marina Boulevard, Berkeley, CA

## Two ways to register

1. Register online at [www.crrcnorth.org](http://www.crrcnorth.org). From the Home Page, select the Calendar tab, then select General Membership, and locate the RSVP link for the Succession Planning Workshop. Fill out the RSVP form and follow instructions for submittal.

- OR -

2. Fill out the form below, and email it to [trish@crrcnorth.org](mailto:trish@crrcnorth.org), or fax it to the CRRC office at 916-442-0623.

NAME

COMPANY

PHONE

EMAIL

CHECK HERE TO SELECT  
THE WEBINAR OPTION

