

# Leave a Lasting Legacy

## EFFECTIVE SUCCESSION MANAGEMENT IS A JOURNEY, NOT A DESTINATION.

Succession planning is about building, retaining and passing on your wealth from generation to generation, leaving a lasting legacy. Every business is unique, and the optimum outcome for each business will be different. Aprio works closely with clients to understand the individual needs and circumstances that must be addressed in the evolution process. In some instances, it means realizing the best possible value for a business. However, it often requires seeking clarity of individual and family goals, developing a business' capital value and addressing a range of other related family and technical issues such as management succession, estate planning, taxation and wealth management.

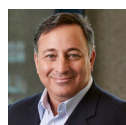


Effective succession planning is a matter of strong practices in personnel management, not a matter of sudden crisis management.

Why start now? Effective succession planning is a matter of strong practices in personnel management, not a matter of sudden crisis management. If ample timing is not allowed, business opportunities could be missed and the potential value of a business could be impacted. Start attending to your future business needs today by creating an initial roadmap using Aprio's customized tool!

- Business Strategy
- Corporate Finance
- Corporate Structuring and Ownership
- Estate Planning
- Family Agreements/Charters
- Investment Strategies
- Life Insurance
- Management Succession
- Risk Management
- Shareholder Agreements
- Superannuation
- Taxation

For more information about Aprio's Succession Planning Services, contact:



**Lee Fields**  
Partner-in-Charge,  
Advisory Services  
[lee.fields@aprio.com](mailto:lee.fields@aprio.com)  
[770.353.4776](tel:770.353.4776)

