



ABOUT THE EVENT

A 2006 CFIB survey found that 73% of BC SME owners plan on exiting their businesses within the next 10 years. The survey also found that only 10% of businesses have a formal succession plan in place!

Accountants are entrepreneurs' most trusted advisors and as such, clients will be turning to you to help with what will be one of the most significant transactions of their lives - are you ready? The Succession Planning Fundamentals Seminar will equip you with strategies for

building value prior to a sale, finding and hiring successors, financing for maximum value and legal methods for protecting your clients' interests. Ensure that your clients are able to secure an optimal succession outcome – don't miss this valuable seminar!

The event includes an offer to all attendees for an hour of free consultation to their clients. Event is also eligible for PD credits.

A continental breakfast will be served.

EXCLUSIVE EVENT INVITATION

SUCCESSION PLANNING FUNDAMENTALS FOR ACCOUNTANTS

RSVP TODAY TO SECURE YOUR ATTENDANCE

Date

Wednesday, October 22nd, 2009

Time

8:00am-11:00am

Location

610 - 1200 West 73rd Ave. Airport Square,
Vancouver, BC

Cost

\$49 paid by cheque received prior to Friday, Oct. 17th in order to secure your attendance. Make cheques payable to Wardell Professional Development and mail to the address above.

To RSVP or for more information, please contact Nancy Melo at:
nancy_melo@vancity.com or 604.877.6565

LECTURE SUMMARIES & BIOGRAPHIES

RSVP TODAY TO SECURE YOUR ATTENDANCE!



**MARK
WARDELL**
PRESIDENT



mark@wardell.biz
604.733.4489

In the area of succession planning, your client's biggest enemy is time. If any of your clients are within five years of wanting to retire, whether they want to transfer their company to the next generation, whether they're planning a management buyout, or they are looking at a third party buyer for their business, they need to begin succession planning—now! In this session, Mark will discuss specific methodologies for both measuring and significantly increasing the goodwill value of a business.

Mark Wardell is President and Founder of Wardell Professional Development. With Wardell members located around the world, his company has developed a reputation for helping entrepreneurs successfully plan, execute and manage the growth of their organizations. Mark has authored seven business books, and regularly writes for several national business publications, including Profit Magazine, the Globe and Mail, and CGA Magazine, among others. Prior to founding Wardell in 1999, Mark's career included time as a management consultant for a major California-based consulting firm, an entrepreneur, a professional musician and a national level gymnastics coach.



**BOB
MURRAY BA**
PARTNER



bob@peoplefirstsolutions.com
604.684.2288

Do your clients have a succession strategy? Has your business owner client planned to replace him/herself? An executive search firm can support the succession plan, process and strategy. When your client is considering the sale of his/her business and determines there is no one to take the leadership position an executive search firm is able to support the process with candidates from a variety of sources. The challenge is to bring a new leader who has the right education, experience, personality and equity to the business. Timing is also of the essence and many business owners are unrealistic about the time-line required for succession – learn what's realistic and why.

As a professional hockey player Bob played for the Atlanta Flames and the Vancouver Canucks long before becoming a founding partner with People First Solutions. After 20 years as a partner in a prominent employee benefits firm, he turned his attention to helping companies recruit and retain top talent. Bob also sits on the board of the Vancouver Canuck's Alumni.



**AXEL
CHRISTIANSSEN CFA**
INVESTMENT MANAGER



Axel_Christiansen@vancity.com
604.877.6582

Financing the purchase or sale of a business is often a confusing and daunting task for both buyer and seller. Sellers often mistakenly, and to their detriment, believe that financing the sale of their business is something best left to the purchaser. Purchaser's lack of financing acumen often leads them to disqualify themselves assuming they lack the resources to make a successful bid. However, when done right - the appropriate financing structure can result in a higher price, more cash at closing and less risk for the seller...and a lower equity requirement and an amplified return on investment for the purchaser. In this session, Axel will describe a variety of conventional and alternative financing tools that can be utilized and provide insight into how business sale transactions are typically structured.

Axel Christiansen has over 15 years experience in structuring and financing over 50 management buy-out and strategic acquisition transactions. Axel is a Chartered Financial Analyst charter holder and a founding member of Vancity Capital, having been with the firm since its inception in 1998.



**WADE R.
WINKLER**
PARTNER



wwinkler@mcquarrie.com
604.526-1821

Many businesses have become very successful through the hard work and hands on management of their owners. These owners are typically so busy with the day to day problems encountered in the operation of their business that many important legal aspects of protecting the assets of their business or improving upon their businesses organization can get overlooked or procrastinated indefinitely. A large percentage of these owners will be searching for buyers of their businesses as they near retirement age. The ultimate goal for many of these owners will be to realize the highest financial return possible on the sale of their businesses to a third party. Now is the time to assist these owners with a legal analysis of their businesses to evaluate the saleable condition of their businesses and to address some of those issues that they haven't had time to deal with. Wade will give an overview of the important legal aspects of putting a business in saleable condition, as well as outline the key factors to consider in the sale and purchase transaction.

Wade Winkler is a partner with the law firm of McQuarrie Hunter and has assisted many of his clients with addressing the above issues. He is a member of the New Westminster Spirit of B.C. Community Committee. He is also a past president of the New Westminster Chamber of Commerce and a past instructor of Business Law, School of Business Administration, Part Time Studies, at the British Columbia Institute of Technology.

JOIN US FOR THIS ONE-OF-A-KIND EVENT— OCTOBER 22ND 2009, 8AM–11AM