



*Working with people in family business*

*Australia's leader in Rural Succession Planning*

As a service to our community  
**Monto Health Service** and **Suncorp Bank**  
have brought this **proAGtive** Succession  
Planning workshop to **Monto**.



## *"Succession Planning for your Family Business"*

### THE WORKSHOP WILL COVER THE FOLLOWING TOPICS:

1. What are the business and personal goals of each family member?
2. What is the purpose of your business?
3. Is your business in a financial position to meet business and personal goals?
4. Understanding your family dynamics and the intergenerational differences
5. Importance of discussing and planning for your retirement
6. Formalising roles and responsibilities and the decision making process
7. Establishing a formalised reward and pay system
8. Developing communication strategies to prevent anxiety/stress and support the health and well being of the people in the business and the business itself
9. Discussing and documenting policies in the business eg housing, vehicles etc
10. Understanding your business trading and ownership structure
11. Understanding the legal and taxation implication for your plans
12. Understanding the role of business advisors in the succession process

**BRING  
AS MANY  
FAMILY  
MEMBERS AS  
YOU CAN!**

**BOOK  
NOW!**

**Date:** Thursday 14th June 2012

**Location:** The Colonial Motor Inn Thomson St Monto

**Time:** 9.00am until 3.00pm

**Catering:** Morning tea and lunch provided

**Cost:** No charge courtesy of Monto Health Service and Suncorp Bank

**TO BOOK, PLEASE EMAIL ISOBEL KNIGHT AT: [isobel@proagtive.com.au](mailto:isobel@proagtive.com.au) OR CALL: 0419 464 857**

*"ProAGtive has changed our lives for the better and moved our family business to a position of potential growth and success for all"*  
Jo and Andrew Slacksmith, Burren Junction, NSW



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