

Exiting, succession and protection planning workshop

Planning for whatever life might throw at you, your family and your business

You've poured years into making your business a success, so how do you successfully navigate through the exit or succession stage?

This two day/night exit/succession and protection planning workshop will inspire and assist you in putting together your plan that will ensure you:

- > exit/sell your business with dignity, at the right time and with loads of cash
- > identify, groom and hand over the reins to a successor of your choice
- > have a 'safety net' to protect you when things go wrong

This is a great opportunity to bring your will, trust deeds and financial reports for your evaluation and to ask the expert facilitators questions. After discussing the relevant issues, you'll come away with a written plan for your exit, succession, retirement, continued good health, family and business protection. You will also have a strategy to help you cope with potential family conflict and the negotiation skills to ensure you get exactly what you want when transferring ownership.

Past attendees have waxed lyrical about the workshop benefits/outcomes:

- > made new friends with fellow motivated business owners
- > very relaxed and had a lot of fun together as a couple
- > went home inspired with new skills and knowledge
- > returned to the business with a plan to share with all who can add value
- > top, experienced and knowledgeable facilitators who obviously really care!
- > a few days away 'working on the business' and not being 'buried in the business'
- > and it is tax and GST deductible

Topics covered at the workshop:

Protection... the safety net!

- > dynamic wills, memorandum of wishes and enduring powers of attorney
- > the ultimate structure: trusts vs. companies vs. partnerships
- > risk and resilience strategies and assurance and insurance
- > tax planning, gifting and debt reduction
- > property relationships act 1976 and contracting out agreements
- > treading the legal minefield

Exiting/Succession... planning for the inevitable!

- > understanding the exit/succession planning process
- > preparing a snapshot of the family business – asset and business analysis a real live case study based on your facilitators vast library of experiences

- > preparation of your exit plan
- > tips, traps and threats of smooth exit/succession – war stories

The Human Dimension – your advisors missing link

- > the cornerstone of your plan – owners written goals
- > discovering children expectations and identification/grooming of successors
- > equal vs. equitable allocation of assets
- > family harmony vs. acrimony and sibling rivalry
- > generational creep and conflict
- > family meetings, communication (DISC) and conflict resolution
- > realising the potential of your professional team
- > inheritance rights and ruling from the grave
- > your people issues

A warning

Be prepared to be refreshed, inspired and motivated to take your life and business journey to the next level and for your relationship/marriage to be enhanced and change your paradigms.

Places are limited for this popular workshop.

To avoid disappointment, we recommend you register at the earliest opportunity. Registration form over page.

Registration Form



YES, I/We would like to attend a BNZ Partners Growth Programme. Please book me/us on the following:

(please indicate the programme, preferred date and room type)

Programme Name Workshop Seminar Masters

Accommodation

Yes No If yes: Double Room Twin Room Single

Details

Name

First	Last
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Mailing address

Street address	
Suburb	
Town/City	Postcode

Contact details

Home 0	Mobile 02
Business 0	Fax 0

Email address

BNZ Partner/Manager (if applicable) Are you a BNZ customer?

<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
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Payment Options

- Online:** register at growthprogrammes.co.nz
- Credit card:** complete details below
- Cheque:** payable to BNZ Partners

Number of attendees Double Single

Amount \$

Credit card details

Name on card

Visa Mastercard

Credit card number

Expiry date

If paying by Credit Card or Cheque, please complete all the details and return to: Vikki Vidmar, BNZ Partners, P O Box 995, Auckland, 1010.

BNZ Partners Growth Programme Workshop terms and conditions

- Applications to attend a BNZ Partners Growth Programme workshop ("workshop") are subject to availability and only registered once payment is received in full. Payments will be processed upon receipt of an application.
- The registration fee covers accommodation and all main meals provided on each workshop day. Any other expenses related to the workshop are the responsibility of the applicant (for instance, travel; internet use; food and beverage costs other than the main meals provided). Workshop attendees are financially responsible for any damage they cause to the hotel premises or equipment.
- The Bank will ensure that information provided by an applicant will be held securely. The Bank will not disclose the information to any person, except for the purposes described in the next condition or as authorised by you or when required or authorised by law.
- The information provided by an applicant will be used primarily for the purposes of the workshop(s) for which the applicant has registered. This will involve the Bank disclosing information to third parties to organise and deliver the workshop(s).
- Once registered, an applicant can withdraw from a workshop or transfer to another workshop at any time by notifying Associate – Growth Programme at the BNZ, however;
 - applicant's transferring to another workshop within 7 days before the first day of the first booked workshop, will (in addition to the cost of the workshop) be charged any hotel cancellation fees or charges and any other fees associated with the transfer incurred by the Bank;
 - applicant's withdrawing within 7 days before the first day of the workshop (including any subsequent workshop transferred to), or not attending the workshop without giving prior notice to the Bank will be charged the full cost of the workshop and any hotel cancellation fees;
 - applicant's withdrawing within 14 to 8 days before the first day of the workshop (including any subsequent workshop transferred to) will be charged 50% of the full cost of the workshop and any hotel cancellation fees;
 - applicant's withdrawing more than 14 days prior to the first day of the workshop (including any subsequent workshop transferred to) will receive a full refund of any workshop payment made.
- The Bank retains all intellectual property rights to the content of each workshop and to the materials provided to each applicant, subject to the rights of the independent presenters.
- The Bank and the independent presenters may make variations to the content or delivery of a workshop from time to time.
- Prices, dates, facilitators and locations of each workshop are subject to change at any time at the discretion of BNZ.
I/We have read and agree to the above terms and conditions.

@ Email growth_programmes@bnz.co.nz

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