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Succession Planning Task Force—Timeline

- **Introduction: "What's to come?"**
    - Introduce the NCACPA Succession Planning Task Force
    - Lay out the 6-month promotional plan
  - **Timing:** Late July (delayed due to PCPS material update) – rescheduled for August
    - September *Interim Report*
  - **Lead:** Mike Gillis

- **Topic 1: "Why this is important?"**
    - "Drivers for change" resource
  - **Timing:** August
  - **Lead:** Kelly Puryear

- **Topic 2: "What now?" (Part 1)**
    - Succession calculator quiz
    - Your four options – sell, merge, an orderly succession plan, or turn out the lights
  - **Timing:** September
  - **Lead:** Dave McIntee

- **Topic 3: "What now?" (Part 2) with more emphasis on the "how"**
    - Blog or testimonial from NCACPA member
    - Strategy considerations (text from here)
  - **Timing:** October
  - **Lead:** Dave McIntee

- **Topic 4: "New leaders/fostering partners"**
    - Chapter called "Developing New Leaders"
    - "Transition Roles and Responsibilities"
    - Consider content from Sam Allred with Upstream Academy
    - (Ben to share about JPS practices and Stacee to support as a YCPA)
  - **Timing:** November
  - **Lead:** Ben Hamrick/Stacee Rash

- **Topic 5: "Frequently left-out logistics/The good, bad, ugly"**
    - Personal testimonials on the process – what worked, what they would do differently
    - Stacee to reach out to their managing partner regarding past merger experience
    - Possibly contact Mark Koziel for comments
  - **Timing:** December
  - **Lead:** Group collaboration for multiple perspectives

- **Topic 6: "Firm of the future"**
    - Educating others/setting expectations (clients, family, staff, other firm if M&A)
  - **Timing:** January
  - **Lead:** Stacee Rash