



Succession Planning Questions and Talking Points

Where do I see myself in five years?

What are my Core Values and how can I live them out in this next phase of life?

What can I do to ensure my vision has a chance to succeed?

What are some of the obstacles I may encounter, both personally and professionally?

What parts of my previous work experience do I want to maintain or carry into another endeavor?

How will I spend my free-time after retirement, so as to have a meaningful and fulfilling life? Will I create a new career?

How do I redefine success after retirement?

How do I see my relationships changing after I retire and what can I do to prepare for the changes?

Will my current financial plan address my needs into the future?

What other business owners can I talk to who have gone through the transition process?

Is my business ready for this transition? If not, what do I need to do to get it ready?

How will the company operate without me? Who will take my place? Is my business partner aware of my plans? How do I involve him/her and consider their needs?