|Succession Resource Group|

Contingency Plan – Project Overview

Meet Your SRG Team

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David's Bio

Online Calendar Link (DG)

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Nicole's Bio

Online Calendar (NF)

Contingency Plan – Project Milestones

MILESTONES	DELIVERABLES
Contingency Plan Questionnaire	Upon receipt of our engagement agreement and payment for our services, we will email our Contingency Plan Questionnaire to you for completion. Once you have returned the completed questionnaire, we will contact you to set up an initial intake call with your consultant.
Initial Intake Call	During the initial intake call, your consultant will discuss the project stages and administrative matters with you, clarify or discuss the answers you provided on the questionnaire, and help you determine the contingency plan options that best suit your preferences and needs.
Contracts	SRG will provide one of our death and disability form contract tailored to the financial services industry and your specific contingency plan as well as a comprehensive Contingency Planning Checklist. Please review the contract with your legal counsel before executing.
Project Completion	Please forward a copy of the signed contracts to SRG for our file. At the completion of your project, you will receive an email from us with a link to our client satisfaction survey. We would appreciate your feedback!