Succession Blueprint – Project Overview

Meet Your SRG Team

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Katelynn Clements's Bio
Online Calendar (KC))

Succession Blueprint – Project Milestones

MILESTONES	DELIVERABLES
Succession Blueprint Questionnaire	Upon receipt of our engagement agreement and payment for our services, we will email our Succession Blueprint 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 define a suitable plan structure, including payment terms, tax allocation, and timeline.
Formal Recommendation	SRG will provide a formal recommendation outlining the initial strategies for your succession plan, including items such as plan structure, timeline, and financing.
Pro Forma Cash Flow Model	You will receive a Pro Forma Cash Flow Model based on the selected plan and financing structure, demonstrating the cash flow implications of the plan.
Memorandum of Understanding	SRG will provide a Memorandum of Understanding which describes the various elements of your succession plan, including buy-in/buy-out stages, tax considerations, timeline, and financing, and provides an outline of the steps to complete throughout the transition phase as well as factors to consider.
Contracts	SRG will prepare comprehensive form contracts tailored to the financial services industry and your specific succession plan. Please review the contracts with 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!