

A good succession plan will assist with the smooth transition of your business and protect the legacy of your business while providing financial security for your family and stakeholders.

Succession can occur in a number of ways; selling to a third party, or transferring future growth to family or key employees. Perhaps, you want to maintain a source of income from the business or remain involved, but in a different capacity. No matter what avenue you choose, we can help.

Navigating the complexities of tax policy to preserve wealth



Contact us to discuss the advantages of incorporating:

Belleville 613.966.5105 - 1.888.728.3890
Kingston 613.634.5581 - 1.866.692.0055
Trenton 613.392.2592 - 1.888.713.7283

www.wilkinson.net



Passing the torch...
It's not that simple

You want to:

- Safeguard the business you built
- Secure the retirement you deserve

**You Need a
Succession Plan**

YOU NEED A SUCCESSION PLAN



A succession plan today for the future that you dreamed of



The Transfer to Family or Employees

Ultimately a succession plan transfers the business in a manner that satisfies both parties.

There are many different options and considerations; we will guide you through the process to develop a plan structured for your unique situation.

These are just some of the options you will need to consider...

- Should I sell the shares, gift the shares or "freeze" the shares?
- Who will run the company during the transition?
- How long should the buyout take?
- Who will pay for the buyout?

Sale to a Third Party

You will face a multitude of decisions and issues on a third party sale; with us in your corner to provide expert advice you will be sure to get the most out of the sale of your business.

Frequently asked questions...

- Should I sell the shares of my corporation or the assets of the business?
- What tax elections need to be filed?
- Can my family and I benefit from the Capital Gains Exemption?
- What does that 100 page agreement mean?



Succession Planning How we can help...

- Our experience with all types of succession plans ensures there are no surprises
- Expert tax advice to ensure the event occurs as tax efficiently as possible
- Valuation services to assist with the determination of the current value of the company
- Retirement planning to ensure you are able to meet your retirement objectives
- Estate planning to assist with your wills and tax planning
- Matrimonial planning using family trusts and prenuptial agreements
- Cash flow planning to ensure the transition can be financed