

# You need a plan to succeed!

*Introducing*

## The Succession Planning Template: Maximizing the Value of Your Brokerage



This **comprehensive guide** to succession planning was created specifically with brokers in mind. Filled with helpful suggestions and important facts, this guide is your **essential resource** for a well-thought-out and thorough plan for succession in your brokerage.

Included with the book is a **CD of all of the templates** shown in the book in Microsoft Excel format so that you can easily customize these templates for your own use.

The Succession Planning Template is available for just \$125.00 including GST and can be ordered through Cookson Walker Consulting by contacting Rachel Beck at (416) 368-7990 x237 or [rbeck@cooksonwalker.on.ca](mailto:rbeck@cooksonwalker.on.ca) or by sending the attached order form to:

The Succession Planning Template  
Cookson Walker Consulting  
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14<sup>th</sup> Floor  
Toronto, Ontario M5H 3C6  
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# The Succession Planning Template

## “Maximizing the Value of Your Brokerage”

Eric Walker, MBA, CA-CBV

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