FutureTaxLeaders.org
A TaxForward Production

Course Information

Program Title	Succession & Transition Planning
Location	History Colorado Center, Berger/Nichols "Green" Classroom, Denver, Colorado
Date	11/22/19
Start Time	14:00:00 MST
End Time	14:50:00 MST
Instructor(s)	▪ Ashby Walters, Executive Director, TaxForward ▪ Ben Johnson, Independent Consultant ▪ Jack Allgood, Retired Partner, ACM
Field of Study	Personnel / HR
Type of Instruction / Delivery Method	Live Group
Prerequisites	No prior knowledge or experience is required.
Advanced Preparation	None
Program Level	Basic
CPE Credit Hours	1.0 hours (based on a 50-minute hour)
CLE Credit Hours (applied)	1.0 hours (based on a 50-minute hour)
Price	This program is $175 for current Future Tax Leaders members, government employees, and faculty and students of qualified accredited programs and $300 for all others. 10% discount for groups of two or more from the same organization.
Complaint Resolution Policy	Questions, concerns, and complaints may be submitted to Info@FutureTaxLeaders.org.
Registration	https://national-conference-2019.eventbrite.com
Refund Policy	Refund available for cancellations made before November 14, 2019, or by Future Tax Leaders.

Course Description
This presentation will address the importance of incorporating succession planning into hiring, compensation, and other employment practices in industry and public accounting and law firms. Attendees will learn steps to effectively and efficiently transition knowledge and responsibilities. Attendees will also learn strategies for seamlessly and securely transitioning an accounting or law practice. The information gained from this presentation can be used to negotiate better compensation packages from employers and terms in employment and sales agreements. Additionally, the information can be used by individuals indirectly impacted by transition to ease and optimize transition occurring within their department and team.

CPE & CLE Compliance
Future Tax Leaders' CPE and CLE courses are designed to comply with Colorado State Board of Accountancy and NASBA CPE and Colorado Supreme Court CLE standards and the provider requirements outlined in sections 88.1 and 88.2 of the California Board of Accountancy Regulations. CPE and CLE courses are based on 50-minute credit hours. Participants must attend at least 50 minutes of a particular course to receive one (1) credit in that course. Participants are encouraged to confirm eligibility compliance with their jurisdiction. CLE hours represent the hours applied for and anticipated.