Agenda

Leader Name	Laurence Egle
Leader Email **Assistant Email**	Laurence@EagleHarborFinancial.com Gina@EagleHarborFinancial.com
Meeting Date	Friday, October 20, 2023
Meeting Location	UT Club, The University of Texas at Austin, 2108 Robert Dedman Dr., Austin, TX 78712 (Park in the Manor Garage, Enter the Darrel K Royal Stadium and take elevators the 7th Floor)

Segment Start Time	**Topic**	**Speaker/Facilitator**	**Agenda Component(s)**
12:00 PM	Networking Lunch in Main Dining Room	Meal	Networking
1:00 PM	**Welcome** • Introductions • What was your biggest success? • What did you discover worked well?	Laurence Egle, CFP® **GTC Leader**	Accomplishments and Best Practice Exchange
1:30 PM	**Avantax Updates**	Andy Watts **V.P. Planning and Growth Solutions**	Avantax Updates
2:00 PM	**Succession Planning: Protecting and Planning for the Future of Your Business** Succession Planning is the planning process that ensures your practice is prepared for the predicted future. Continuity Planning is the planning process that ensures your practice is prepared for the unforeseen future. We will cover the steps needed to develop a plan to help protect what you built, for planned or unplanned events. Steps to develop an ultimate succession plan, that will provide you peace of mind, protect your business, protect your family, and ensure your clients will continue to receive the service and support they need and deserve.	Laurence Egle, CFP®	1 CPA CPE credit hour

3:00 PM	**The Benefits of the Strategic Partnership Program (SPP)** Panel discussion on the benefits and features of the Strategic Partnership Program.	Mary Barakat **Avantax Manager: Business Development Projects** Dustin Gersch Brad Van Houten **Alliance Wealth Strategies**	Presentation Panel Case Study
3:30 PM	**Brighthouse Financial Presentation** *Please see materials from Brighthouse Presentation	Tim Knight **Brighthouse Financial**	Presentation from Sponsor and Educational Partner
4:00 PM	**Inland Securities Corporation** *Please see materials from Inland Securities Presentation	Ryan Conoboy **Inland Securities**	Presentation from Sponsor and Educational Partner
4:30 PM	Goal Setting and Action Steps	Laurence Egle, CFP®	Goal Setting and Action Steps
5:00PM	Happy Hour: Sponsored Refreshments	Jason Grimes **MFS Investment Management**	Networking

*** Succession Planning: Protecting and Planning for the Future of Your Business**

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Learning objectives

- ♦ Understand the benefits/need for succession planning and business continuity plan
- ♦ Understand the succession planning process/life cycle
- ♦ Be armed with best practices for succession planning, including buy/sell agreements, business continuity plans, etc.
- ♦ Understand firm valuation and variables you can influence to improve the valuation of your firm

NASBA Field of Study: Specialized Knowledge Recommended Credit: 1 CPA CPE credit hour
Instructional Delivery Method: Group Live
Program Knowledge Level: Basic
Pre-requisites: None
Advance preparation: None
Authors: Craig Johnson, Director, Programs & Partnerships, Avantax Ben Lee, Program Manager, Partnership Programs, Avantax Kathy Giese, Senior Program Manager, Partnership Programs, Avantax

Instructor: Laurence Egle, CFP®

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