



**BUSINESS
TRANSITIONS
FORUM**

NOV 7-8, 2018
WESTIN BAYSHORE, VANCOUVER

THE 100-DAY POST-CLOSING PLAN

MODERATOR

DAVE MASON, *Director, UBS Investment Management Canada Inc.*

PANEL

STEPHANE BOURQUE, *Co-Founder & CEO, Incognito Software Inc.*

CINDY DAVID, *President, Cindy David Financial Group*

SILVANA FACCHIN, *Partner, Richards Buell Sutton LLP*

BRUCE MACKENZIE, *Owner, Chapman & Associates*



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**You've Focused on Growing
a Successful Business...
*that focus shifts once you've
closed the sale of your
Business***



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What are the Core Components of a Successful Transition?



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What's the Importance of the first 100-Days?



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When Should You Start Planning for the Integration of your Business?



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Who Should Be Involved and/or Driving the Transition?



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**How do you ensure your
communication plan
alleviates the fears &
concerns
a transition creates?**



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What Are the Most Common Causes of Failure?



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**How Will You Ensure That the
Wealth You Have Created Will Go
to Work For You?
*...so that you don't have to
go back to work?***



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War Stories



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Horror Stories



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Questions for the Panel?



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