## What will the advisor learn from this presentation?

In this presentation, the advisor will gain valuable knowledge about their own succession planning process and how to do it effectively, profitably, and ethically.

## Presentation Overview

Rod Burylo will discuss the urgent need for succession planning in the financial services industry, including an assessment of the business case, the professional responsibility, the risks, and the opportunities for both potential buyers and sellers.

Burylo will highlight the impact of recent developments on succession planning, from covid to regulatory reform. Advisors will learn best practices when developing and participating in a succession plan.