



Succession Planning: A Weekend Retreat Tailored to Your Family's Needs

For family businesses, succession planning is more than just a transfer of leadership—it's a preservation of legacy, values, and long-term vision. At Strategos Group, we understand that every family is unique, and that's why our weekend retreats are designed to meet you **exactly where you are** in the succession process, whether you're just starting to think about the future or you're ready to finalize the transition.

Why a Weekend Retreat?

The demands of daily business operations can leave little time to focus on the bigger picture of succession planning. Our exclusive weekend retreats bring together **your family and trusted advisors—lawyers, accountants, brokers, and financial planners**—to address all aspects of succession in a relaxed yet structured environment. Strategos Group fills the gaps, facilitating the retreat and ensuring that every voice is heard, every concern is addressed, and a cohesive plan is developed.

Tailored to Your Family's Stage of Succession

No matter where your family is in the succession planning process, our retreat is built to meet you there. Here's how we help at each stage:

Early Stages: Starting the Conversation

In many cases, the hardest part of succession planning is just starting the conversation. Family businesses can struggle with how to bring up the topic of transitioning leadership or ownership without causing friction.

At this stage, we focus on:

- **Opening lines of communication:** We facilitate honest, open discussions about the future of the business, ensuring all voices—both senior and younger generations—are heard.
- **Building trust:** Our expert advisors help set a collaborative tone, guiding the family through conversations that can be difficult but necessary.
- **Exploring roles and responsibilities:** Together, we'll explore who in the next generation might be interested in leadership roles and who may want to pursue other opportunities, all while keeping the family's legacy intact.

Mid-Process: Developing the Strategy

Once the conversation has started, the next step is developing a clear, actionable plan for the business transition. This can involve preparing the next generation for leadership, addressing any gaps in financial literacy, and ensuring the current leaders feel confident in the process.

At this stage, we focus on:

- **Financial literacy for younger generations:** We offer sessions specifically for the next generation to improve their understanding of the business's financials, governance structures, and strategic planning.



- **Strategic decision-making for senior members:** Senior family members will engage in sessions focused on aligning personal goals with the family's long-term business strategy, ensuring that the transition is not only smooth but also beneficial for all involved.
- **Legal and financial readiness:** Our team ensures all legal, tax, and financial matters are in order, from estate planning to governance structures that will support the family well into the future.

Final Stages: Executing the Plan

For families who are ready to make the transition, our retreat provides the final touches. Ensuring the right systems are in place to support a smooth handover is crucial to success.

At this stage, we focus on:

- **Finalizing governance structures:** We ensure the business has a clear governance model that balances leadership between generations while protecting the family's interests.
- **Implementation support:** We guide families through the final steps of implementation, ensuring all legal documents are signed, financial strategies are in place, and each family member understands their role moving forward.
- **Ongoing communication:** Succession doesn't end with the handover. We help families build systems for continuous communication, including regular family meetings and updates to keep everyone aligned.

What to Expect During the Retreat

Our retreats offer a balance of focused work and relaxation, allowing your family to address the tough issues while also enjoying time together. Here's what you can expect:

- **Preparation:** Prior to the weekend, you and your advisors will gather relevant information and documents, which will be compiled into a **custom leather workbook** for use throughout the retreat. This ensures everyone is prepared and on the same page.
- **Structured Sessions:** The weekend will feature a mix of group discussions, expert-led workshops, and one-on-one consultations. Sessions will be tailored to your family's specific needs, ensuring that each stage of succession planning is addressed.
- **Collaboration with Your Advisors:** We bring together your trusted advisors—**lawyers, accountants, brokers, and financial planners**—to ensure that every aspect of the transition is considered. This creates a unified team, all working towards the same goal: the success of your family business.
- **Fun and Relaxation:** We believe that taking time away from the everyday pressures of business is essential for effective planning. That's why our retreats are held at **luxury locations** across Nova Scotia, offering leisure activities like golf, nature walks, or spa treatments to balance the work and family time.



The Key Benefits

1. **A Unified Family Vision:** By the end of the weekend, your family will have a clear, actionable succession plan that everyone agrees on, minimizing future conflicts and misunderstandings.
2. **Strengthened Communication:** Difficult conversations become easier when there's a structure in place. Our retreat creates a safe space for family members to express concerns, ask questions, and get aligned.
3. **Financial Literacy and Strategic Confidence:** Younger generations will leave the retreat with a stronger understanding of the business and a clearer sense of their future role, while senior members will feel confident that the business is in capable hands.
4. **Collaborative Execution:** With all your advisors working together, the retreat ensures that every element of your succession plan is integrated—legal, financial, and strategic—giving your family peace of mind.

Ready to Plan Your Family's Future?

Succession planning can be complex, but you don't have to do it alone. Let Strategos Group guide your family through a weekend retreat that will not only clarify your next steps but also bring your family closer together.

Strategos Group specializes in guiding family-owned businesses through complex financial planning and succession strategies. Our team of experts ensures that your business and family legacy are protected through customized planning solutions, from governance structures to financial management and beyond.

For more information, visit www.strategosgroup.ca.

[Schedule a consultation](#) or contact us at info@strategosgroup.ca | 902-754-1053.