UltimatePractice
REDEFINING YOUR LEGACY

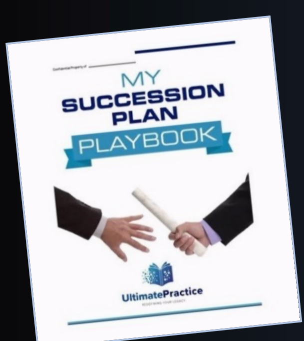
NEW Online Course

Succeeding at Succession™

9-Stage Journey from AWARENESS to ACTION for exiting your business!

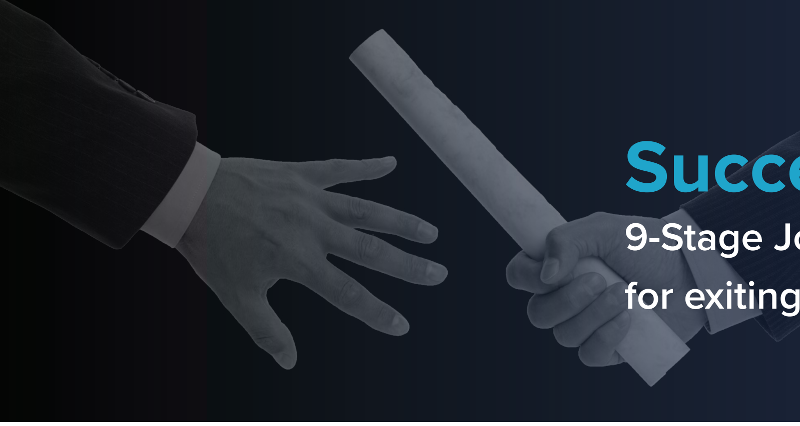
The reality is that you will leave your business one day.
The question is:

“Will you be in control of your exit, or will you allow fate and circumstance to dictate what happens to the business you have spent so many years building?”



My Succession Plan Playbook is a 35-page workbook where you record all the details of your “Exit Plan” as it is developed during your progress through the course. It becomes your permanent record of your ambitions, choices & decisions, so that when the day comes, you can implement with confidence. The Playbook is fully editable — if you change your mind about anything along the way, you can easily update your plan, so it will always be ready when you are.

Register for the course by visiting **www.ultimate-practice.com**



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What should you expect from this course? A proven formula that:

- ✓ Shows you how to **maximize the value** of your business prior to sale
- ✓ Puts **you in control** of your exit plan – not fate and circumstance
- ✓ Ensures you are **financially capable** of having the lifestyle you want
- ✓ Gives you **confidence in the emotionally difficult choices** you have to make
- ✓ Ensures you **are leaving your clients in great hands**
- ✓ Provides **the legacy you want and deserve**

COURSE OUTLINE

Succeeding at Succession™ is organized into 3 modules, each with 3 "levels" to take you on a 9-stage journey — from *Awareness* to Action — in preparation for your **eventual, but inevitable** exit from your business.

MODULE 1 – *Get Real!* Gives you an understanding of the foundations of the succession planning process, dispels common myths & misinformation, and conducts a reality check to determine the starting point for your succession planning.

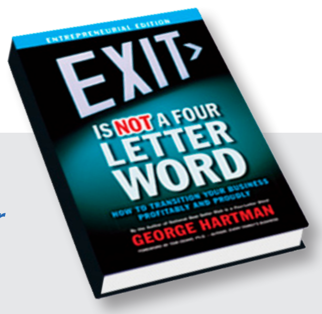
MODULE 2 – *Get Ready!* Helps you determine answers to the two most important questions regarding your succession plan:

- ***Am I ready*** to exit my business?
- ***Is my business ready*** for me to exit?

MODULE 3 – *Get Rocking!* Leads you through development of your Action Plan:

- Choosing the best exit option
- Selecting a great successor
- Putting together a good deal
- Planning a successful transition

> This course is a MUST DO for every advisor when they're half our age. I thought I was so smart about everything regarding what to do when you decide to exit. As I kept working through all this stuff, it amazed me — all of the things that I hadn't considered.
>
> — **Stephen Bishop,** *Financial Advisor, Stephen Bishop & Associates of Raymond James Ltd.*



BONUS OFFER **A signed copy of George Hartman's best-selling book *EXIT is NOT a Four Letter Word – How to Transition Your Practice Profitably & Proudly***

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Choose the learning option most suited to you:

Group Course (10 weeks)

Next course starts soon – see website

- 20+ Video lessons (5 – 20 minutes in length)
- 40+ “Missions” – short, written assignments
- 1-year unlimited access to all course material
- 1:1 Digital Coaching (Private Chat)
- Community (Group Chat)
- Top-rated Weekly Live Coaching Q & A sessions
- 14-day “No Hassle” full refund guarantee

Click to be notified when Group registration opens

DIY (Self-paced)

Begin anytime you want!

- 20+ Video lessons (5 – 20 minutes in length)
- 40+ “Missions” – short, written assignments
- 1-year unlimited access to all course material
- 1:1 Digital Coaching (Private Chat)
- 14-day “No Hassle” full refund guarantee

Click to subscribe and begin right away!

Course Module Specifics

MODULE 3 **Get Rocking**	**LESSON SEVEN** **Door #1; Door #2; Door #?** Choose the best exit option you so you don’t have to compromise when the time comes	**LESSON EIGHT** **I Hereby Knight You** Know what makes a great successor so they don’t fail in their role as custodian of your legacy	**LESSON NINE** **Let’s Make a Deal!** Learn what makes “a good deal” to eliminate the risk of having your plan falter in the details
MODULE 2 **Get Ready**	**LESSON SIX** **On Your Mark, Get Set…** Gain and maintain control of the timing of your transition without locking yourself in	**LESSON FIVE** **Where’s My Head?** Understand and manage the emotions of succession, so they don’t get in the way of what you want	**LESSON FOUR** **What’s My Number?** Don’t ***under-estimate the cost of your own retirement*** to avoid a lifestyle you don’t want or deserve
MODULE 1 **Get Real**	**LESSON ONE** **The Truth is…** Drop the excuses and pretences so you can ***start planning without fear or procrastination***	**LESSON TWO** **Facts & Fiction** Stop believing all the succession planning myths to ***avoid making decisions that aren’t based on facts***	**LESSON THREE** **Show Me the Money!** Learn what creates value in your practice ***so you aren’t short-changed*** when you decide it’s time to sell

LEARNING OUTCOMES

By the time you have completed the course, you will have fully documented your exit plan in your personal Playbook that describes how and when you will transition your business, and how you will ensure your legacy is the one you want and deserve.

> The course has redirected my focus from retiring in 12 -18 months, to all the things that I now have to do to get myself there.

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> The ***Succeeding at Succession course*** helped me put a new lease on life of my business after 40 years in the industry. I came out of this experience with a more positive outcome than I expected as this process gave me a setting to deeply think about the future of my practice. It was a powerful and valuable environment having George Hartman at the table, with his depth of knowledge and his extensive experience in this area.
>
> The weekly calls with George provided a unique setting for conversations with other advisors that allowed for different perspectives and instant feedback and the succession plan booklet gave the whole process traction ensuring actionable ideas were considered and documented.
>
> I highly recommend anyone who wants to have the best possible outcome for their inevitable exit from their business take George's succession course – there is nothing like it in the industry.

Bradley Moore, *CFA®. Founder, SAGE Connected Investing*

About George Hartman MBA, Founder & Coach

Our online ***Powering Your Practice™*** **courses** are based on industry best practices and three decades of real-life experience in educating, training, and coaching great advisors around the world. These courses are being developed, led, and managed by **George Hartman**, one of the industry's best-known advisor strategists, practice management mentors, practice valuation and succession planning experts. George currently coaches top-performing advisors in Canada and the US and consults with financial firms on their business strategy and succession plans.

George Hartman, MBA
Founder, Ultimate Practice

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