

# You need a plan to succeed!

*Introducing*

## The Succession Planning Template: Maximizing the Value of Your Brokerage



This **comprehensive guide** to succession planning was created specifically with brokers in mind. Filled with helpful suggestions and important facts, this guide is your **essential resource** for a well-thought-out and thorough plan for succession in your brokerage.

Included with the book is a **CD of all of the templates** shown in the book in Microsoft Excel format so that you can easily customize these templates for your own use.

The Succession Planning Template is available for just \$120.00 plus tax and can be ordered through Cookson Walker Consulting by contacting Rebecca Case at (416) 368-7990 x237 or [rcase@cooksonwalker.on.ca](mailto:rcase@cooksonwalker.on.ca) or by sending the attached order form to:

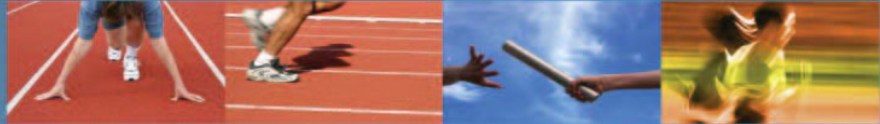
The Succession Planning Template  
Cookson Walker Consulting  
200 University Avenue, 14<sup>th</sup> Floor  
Toronto, Ontario M5H 3C6

Or fax to: (416) 368-0886

Available for  
**\$120.00**  
*(plus applicable taxes)*



Cookson Walker Consulting



# The Succession Planning Template “Maximizing the Value of Your Brokerage”

Eric Walker, MBA, CA-CBV

**YES! Please send me a copy of The Succession Planning Template.**

Name \_\_\_\_\_

Company \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Item	Quantity	Unit Price	Total
“The Succession Planning Template” Book plus CD	_____ @	\$ 120.00	\$ _____
Provincial/Territorial Sales Tax			\$ _____
5% - AB,SK,MB,QC,PE,NT,NU,YT	\$6.00		
12% - BC	\$14.40		
13% - ON,NL,NB	\$15.60		
15% - NS	\$18.00		
		<b>GRAND TOTAL</b>	\$ _____

**Credit Card:**     Visa     MasterCard     American Express

Credit Card Number: \_\_\_\_\_ Expiration: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Cardholder’s Signature: \_\_\_\_\_

**Cheque:**  Enclosed (make cheque payable to Cookson Walker)  Please invoice me