Seven Keys to Effective Succession Planning

(90-minute webinar – available live or on-demand)

Wednesday, November 17, 2021

This is a morning webinar

8:00 AM Pacific 9:00 AM Mountain
10:00 AM Central 11:00 AM Eastern

Register Here

Successful succession planning can seem elusive. But this how-to webinar will reveal seven key steps to effective succession planning and provide the strategies that will ensure success.

AFTER THIS WEBINAR YOU'LL BE ABLE TO:

- Appreciate the importance of effective succession planning
- Understand the different types of succession planning, including long-term, near-term, and emergency planning
- Identify key strategies to ensure an effective succession plan
- Define key components and action items to prepare for a management transition
- Recognize best practices for this important aspect of operations

WEBINAR DETAILS

Aging is a fact of life. Unfortunately, community-based financial institution shareholders, officers, and directors are not exempt from this reality. At some point, each individual will no longer be able to serve in their current capacity. Will your institution be properly positioned for this significant transition? If you are not preparing today for that event, the answer is likely to be 'no.' This webinar will present seven key steps to effectively plan for shareholder, officer, and director succession.

WHO SHOULD ATTEND?

This informative session is designed for senior management.

TAKE-AWAY TOOLKIT

- Written materials will underscore the need for succession planning and its importance as part of corporate governance and strategic planning
- Employee training log
- Interactive quiz

DON'T MISS THESE RELATED WEBINARS!

Board Essentials

on Monday, July 1, 2019

Strategic Planning for Community Banks
on Wednesday, September 29, 2021

MEET THE PRESENTER

Greyson E. Tuck, Esq., Gerrish Smith Tuck, Consultants & Attorneys

Greyson Tuck is a member of the board of Gerrish Smith Tuck, PC, Attorneys and Gerrish Smith Tuck Consultants, LLC of Memphis, Tennessee. Greyson's legal and consulting practice places special emphasis on community bank holding company formation and use, mergers and acquisitions, regulatory matters, corporate reorganizations, corporate taxation, general corporate law, and strategic planning.

He holds a bachelor's in accounting and finance from the University of Tennessee and received his law degree from the University of Memphis Cecil C. Humphreys School of Law. He is also a graduate of the Paul W. Barret, Jr. School of Banking and serves as a faculty member at a number of banking schools across the country. A frequent presenter at national and state association conferences, Greyson has authored a number of articles of interest to financial institutions.

THREE REGISTRATION OPTIONS – WHAT YOU GET

1. Live Webinar Includes

- Unlimited connections within your institution to the Live Webinar
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Presenter's contact info for follow-up

2. On-Demand Webinar Includes

- Recording of the Live Webinar
- Available two business days following Live date
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Free Digital Download, yours to keep
- Share link with anyone at your institution
- Presenter's contact info for follow-up

3. Purchase the **BOTH Option** to receive all the benefits listed above! Full registration descriptions can be found **here**.

If you need help with anything, please drop us an email at
support@financialedinc.com or call 406.442.2585