

PRESENTER PROFILE



Dr Craig West Founder & Executive Chairman

Dr. Craig West is a well-known expert in business succession and exit planning, with a wealth of experience and knowledge in helping business owners maximize the value of their enterprises and build significant companies. As the Founder and Chairman of Succession Plus, since 2009, Craig has led the firm to become Australia's largest business succession and exit planning company, with a presence in New Zealand, the UK, and the USA. His academic credentials include a Doctor of Business Administration, a Master of Tax Law, and a Master of Business in Accounting and Finance, showcasing his deep understanding of the complexities involved in business transitions. His doctoral thesis on the key drivers of succession and exit, examined key changes in exit intention and successful strategies employed by owners.

Craig's contributions to the field have been widely recognized through numerous awards and accolades. He was named Exit Planner of the Year in 2015 at the Exit Planning Institute Annual Conference in Texas, USA, for his innovative exit planning process. In 2024, he was inducted into the Exit Planning Institute Circle of Excellence, further cementing his status as a leader in the industry. Additionally, his Employee Ownership structure has won ESOP of the year twice in four years, highlighting his commitment to creating sustainable business models.

As an accomplished author, Craig has shared his insights and expertise through various publications and platforms. He has published six books on asset protection, business valuation, succession planning, exit strategies and employee ownership. Craig acts as a Non-Exec Chairman for several mid-market businesses where he guides ownership mindset and corporate governance as businesses grow towards succession. Craig's extensive experience and achievements make him a highly sought-after keynote speaker, offering valuable perspectives on business succession, value gap assessment, and employee ownership solutions.

MESSAGE FROM THE FOUNDER

I've been a strategic accountant and advisor to small businesses for more than twenty years, and throughout that time, I have identified a number of key steps that business owners can take to dramatically improve the financial performance of their businesses.

One of these is '**Business Succession & Exit Planning**'. It is one of the most important yet most misunderstood financial strategies for any business owner. It relates directly to your ability as a business owner to extract the maximum amount of value from your business when it comes time for you to exit. Many business owners will invest decades in building a successful business, the next step is to ensure that your investment pays off and provides you with the financial rewards that you set out in business to achieve.

I believe that there are 21 key steps involved in effective succession planning which identify and cover off the vital points in this complex process. However, there is no 'one size fits all' solution. Your Business Succession & Exit Plan must be developed specifically for the needs of your business and financial objectives.

Our business is entirely focused on designing and implementing successful exit strategies which achieve the owners' goals, release them from the business they have been so heavily invested in, in blood, sweat and tears, and provide the financial reward they deserve, in what for many is their greatest asset, but often the most difficult to unlock.

Our international partnership is a team of highly skilled experts who bring a wealth of experience and passion to helping you maximise the value of your business and achieve a successful exit.

Best wishes,

A stylized, handwritten signature in black ink, appearing to read 'CW' or 'Craig West'.

Dr Craig West
B. Bus (Mgt), M. Tax Law, M. Bus (Acc/Fin), DBA, CEPA