



PRESENTER PROFILE

Succession Plus are specialists in providing proactive, focused and strategic advice for small to medium business owners in Australia, using our unique Intellectual Property and processes to manage Business Succession and Exit Planning.

One of the largest concerns of baby-boomer business owners relates to their ability to realise all of the hard work, often over several years, to convert the large portion of the wealth contained in the business and related assets.

We have assisted many business owners over the last nine years to maximise the value contained within their business and achieve a successful exit.

Succession Plus are experienced in presenting to groups of all sizes. Throughout the years, our educational seminars have been presented to more than 10,000 people in metropolitan and rural areas across Australia, New Zealand and the US. These programs have been presented to the general public, as well as for a variety of corporate, government, business associations and networking organisations. We have presented to Department of Industry, Tourism and Resources sectors, MLC, NSW Department of State & Regional Development, NSW Chamber of Commerce, LJ Hooker, H & R Block, Kwik Kopy and ReMax.

In addition, we have designed and delivered customised education programs including keynote presentations, half day workshops and a 6-part webinar series for professional associations of business advisers for CPA Australia, Sentry Financial, Now Infinity and The Institute of Chartered Accountants.

BEGIN
WITH
THE END
IN MIND Stephen R. Covey
The 7 Habits of Highly Effective People

OUR SEMINARS AND KEYNOTE PRESENTATIONS



Adviser Events

These presentations provide insight into the rapidly growing Business Succession and Exit Planning industry, a topic of vital importance to accountants, financial planners, bankers, business coaches and lawyers as large numbers of baby-boomer business owners approach retirement. These workshops provide latest research as well as current strategies to help clients design a Business Succession and Exit Plan, maximise the value of their business and achieve a successful exit.

Business Owner Events

Succession Plus holds regular presentations open to the general public. These seminars currently cover two main topics: Maximise the Value of Your Business and Employee Engagement and are focused on business owners whose business' revenue is \$2M – \$50M. They are typically starting to contemplate their exit strategy and are seeking more information in this area. Both seminars are free and have proved very popular with business owners, who are looking for solutions and advice as to how to approach this topic.

- **Maximise the Value of Your Business**
The Maximise Value seminar explores the what, when, why and how of Business Succession and Exit Planning. The key internal and external factors that are critical to maximising the value of any business are highlighted and explained within the context of value enhancement. Participants are shown how to transfer ownership on their terms, in their own timeframe.
- **Employee Engagement**
The Employee Engagement Seminar highlights the importance of having engaged and motivated employees and introduces the idea of getting employees to think and act like business owners. The presentation shows attendees how to utilise Employee Share Ownership Plans to attract, retain and motivate high calibre staff and as a business and exit planning succession tool.

OUR PRESENTER

CRAIG WEST – CEO & Founder

B. Bus (Mgmt), M. Bus (Acct/Fin), M. Tax Law, CPA



Craig West is a strategic accountant who has over 25 years' experience advising business owners. His background as a CPA in public practice, provided invaluable experience in the key issues of concern to business owners. Following 6 years of study to gain two master's degrees, Craig focused on Capital Gains Tax (CGT) for business sales advising on strategic management of tax issues. This experience formed a very strong view that business owners (and often their advisers) were unprepared and unaware of the steps required to prepare a business for exit.

Craig now acts as a strategic mentor for mid-market business owners and has written four critically acclaimed books on [employee incentives](#), [succession planning](#), asset protection and exit strategies. Craig has conducted numerous seminars and keynote presentations throughout

Australia & internationally, including adviser education programs for the Institute of Chartered Accountants, IOOF and CPA Australia.

Craig's practice [Succession Plus](#) is the largest Business succession and exit planning firm in Australia, with offices in every state and provides advice and strategy for clients looking to prepare their business for a successful exit.

In March 2014, Craig was appointed Executive Chairman of the [SME Association of Australia](#), Australia's largest small business organisation representing over 300,000 business owners. In October 2014, he was awarded the [Exit Planner of the Year](#) at the Exit Planning Institute Annual Conference in Texas USA as a result of his innovative development of an exit planning process to help business owners maximise business value and achieve a successful exit.

During 2015, Craig commenced Doctoral studies on the topic of using Employee Share Ownership Plans (ESOPs) as a Business Succession and Exit planning tool. Craig's proprietary structure - a [Peak Performance Trust](#) - has won the Australia wide award for the Employee Share Ownership Plan of the year twice in four years.

In August 2018 Craig worked closely with Mark Bouris and the team at Mentored to build a platform of resources and tools for SME business owners, including an online business sales platform.

In November 2018, Craig launched SME Experts, in partnership with Mark Bouris' Mentored on Podcast One and quickly grew the monthly podcast audience to over 26,500 downloads. In September 2019 he is releasing Mid-Market Matters, a new podcast focused on medium-sized businesses.

Craig is passionate about encouraging business owners to think strategically, maximise the value of their business and achieve a successful exit.

Media:

[Exit Coach Radio – Exit planner of the year interview](#)

[Interview with Ben Fewtrell on Business Succession and Exit planning](#)

[Ovations Speakers Bureau](#)

[SME Experts with Craig West on Podcast One](#)

MESSAGE FROM THE CEO

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 handwritten signature in black ink, appearing to read 'CW' or 'Craig West', written in a cursive style.

Craig West
B. Bus (Mgmt.), M. Bus (Acct/Finance). M. Tax Law, CPA

TESTIMONIALS

Emma McWhannell

eLearning & Programs Specialist, Institute of Chartered Accountants Australia

"Craig presented informative, practical session on Succession and Exit Planning at the Institute of Chartered Accountants Australia's Public Practitioners Conference. These sessions were extremely well received, leaving plenty for our members to think about in their own practices and also how they can provide succession planning advice to their clients. Furthermore, Craig's six-part webinar series left members of the Institute of Chartered Accountants Australia thrilled with not only Craig's knowledge and enthusiasm but his willingness to assist them after each session. Based on the feedback collected from attendees as note, the overall satisfaction rating was 96%, which is at the very top end of our scale. Several comments from attendees included:

- Best presentation of the day – relevant to our firm and clients.
- Very insightful, real life examples are fantastic.
- Extremely practical session the likes of which I've not seen before.
- So challenging and deeply thought provoking.
- Immense knowledge transfer from speaker to audience – Thank you.
- Finished the day on a passionate and interesting speaker."

Kathy Paget

RI Advice Group

"Well presented. Very relevant to our business and to me personally".

Ebony Van Der Meer

Rural Doctors Association of Queensland

"RDAQ would certainly be interested in ongoing involvement with yourself and Succession Plus in future years in one form or another."

Michael Pascoe

Financial Journalist – Sydney Morning Herald

"Have seen & recommend Succession Plus's Employee Engagement Seminar".

Colin Stein

Business coach – SteinCo

"Absolutely fantastic! Well presented, content applicable and a good 'wake up' to many business owners".

Leanne Howard
General Manager, Total Real Estate Training

"Craig West recently spoke at the Real Estate Leadership Conference on Hamilton Island. He addressed over 150 of Australia's leading real estate principals and really impressed the entire audience. Craig has the unique gift of being highly engaging and delivering an enormous amount of solid take home value. I know many of the delegates walked away rethinking their entire financial structure and succession plans for their businesses. Finding great speakers that entertain and offer lots of business changing content are hard to find and we will definitely have Craig back again. He was a pleasure to work with and took a lot of time prior to the event to understand the audience and what they wanted to hear. His presentation absolutely hit the mark in every way. He would be a hit at any conference and I can't recommend him highly enough."

Rob Mahony
National Australia Bank

"Professional. To the point. No waffle. Assists with preparing voluntary exit strategies and knowledge".

Greg Boston
Chartered Accountant – Camphin Boston

"Enjoyed the casualness of the presentations."

John Broons
Chairman TEC WA

"Inspirational as well as a practical focus on ideas/planning for succession. Your appreciation and understanding of the topic was comprehensive and they showed their appreciation with their high scores. Once again, sincerely, thank you."

Col Pritchard
Franchise Director, H&R Block

"Over the years we have had many presentations and conferences – Craig's was without a doubt one of the top experiences we have had. Many thanks."



To arrange a presentation for your event:

Contact us

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Visit our website for all our Australian locations.

 [linkedin.com/company/succession-plus/](https://www.linkedin.com/company/succession-plus/)

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