Succession Planning Resources

Situational Awareness

- Succession Tsunami (Bomal, Cruz and Pholmann 2022): Succession Tsunami: Preparing for a decade of small business transitions in Canada (cfib-fcei.ca)
- Getting the Transition Right (Cruz 2018): Succession 2018 (hubspotusercontent-na1.net)
- Addressing Barriers to Succession Planning for Small to Medium Enterprises (BC Chamber of Commerce 2022): Addressing Barriers to Succession Planning for Small to Medium Enterprises (2022) | British Columbia Chamber of Commerce (bcchamber.org)
- The Coming Wave of Business Transitions in Canada (Corner and Ratté 2017): The Coming Wave of Business Transitions in Canada – BDC Study
- Business Valuation - It's Not Just for Succession Planning (Kiser 2022): Business Valuation | Blog | Libro Credit Union

Guiding Materials

- Succession Planning 101 (Community Futures 2012): ebook-succession-planning.pdf (cfsun.ca)
- The SuccessionReady Podcast (Grieve and Wirk 2023): The SuccessionReady Podcast • A podcast on Spotify for Podcasters
- Are You Prepared for Selling Your Business? (Middlesex County 2023): Are You Prepared for Selling Your Business? Small Business Succession Training Now Available in Middlesex County | Invest in Middlesex
- Family Succession Planning (Deloitte 2015): Business succession planning (deloitte.com)
- BDC Checklist – Prepare your business for its sale (Business Development Bank of Canada): 10313-checklist-to-sell-a-business.pdf (bdc.ca)
- BDC – How to sell your business (Business Development Bank of Canada): How to sell your business | BDC.ca
- Building a Succession Plan (Canadian Federation of Independent Business): building-a-succession-plan.pdf (ubc.ca)
- Acadia 6-Page Succession Plan (Acadia Entrepreneurship Centre): 6 Page Succession Plan.pdf (tourismns.ca)

Transition Service Providers

- SuccessionReady: SuccessionReady
- SuccessionMatching: SuccessionMatching
- interVal Business Valuation: Libro + InterVal | Libro Credit Union