

# EXIT STRATEGIES FOR BROKERS: SUCCESSION PLANNING & LEGACY BUILDING 3-HOUR BROKER CONTINUING EDUCATION

## EXIT STRATEGIES FOR BROKERS:

### Succession Planning & Legacy Building

BROKER APPROVED CE PENDING

**Dr. Danette O'Neal**



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## Plan Your Future. Protect Your Legacy.

A comprehensive training designed for Managing Brokers and Brokerage Owners ready to transition ownership and leadership effectively. You'll explore succession planning models, legal and financial considerations, and strategies to preserve company culture while building your legacy



- **Avoid costly mistakes**
- **Preserve your company's value & culture**
- **Gain control over your exit timeline**
- **Leave the legacy you envision**

Without a plan, 70% of brokerages risk rushed, undervalued, and risky transitions. This workshop gives you the tools to exit on your own terms.



- ✓ Define the key elements of a succession plan
- ✓ Identify potential successors and leadership strategies
- ✓ Outline legal, financial, and tax considerations
- ✓ Build a timeline & action plan for your exit



To Schedule this class: 504.233.3331



<http://danetteoneal.com>



[danetteoneal@me.com](mailto:danetteoneal@me.com)