

# Pick Your Successor

## 5 Critical Steps to Pick Your Successor and the Potholes to Avoid

Complimentary Webinar Mar. 18, 2025



The success of the business to serve future generations starts with the decisions you make today. We advise owners against getting locked into only one path without considering all the transition options and how they will impact their succession plan. Getting this right is a critical part of post-transition satisfaction. Think about what is going to be best for you, your family, your employees, and your community.

This webinar can significantly shift your level of understanding on how to effectively plan for succession in your family business, where the tricky dynamics of love, power, and money can trip up even the best. The business's ability to serve future generations and continue to build family wealth starts with the decisions you make today.

- Mar. 18, 2025
- 10:00 AM – 11:30 AM
- Complimentary Webinar
- Virtual via Zoom
- Registration is required:  
[mrcpa.org/events](https://mrcpa.org/events)

\*Fees and times subject to change. Visit [mrcpa.org/events](https://mrcpa.org/events) for current details.

### Webinar Highlights



In this webinar you will learn about:

- Leadership Succession
- Ownership Transition
- The family Conversation
- The role of Governance – board, family council, family constitution

### Who Should Attend

Owners of Family Businesses and Privately-Held Companies with revenue between \$5M and \$150M+, who have a 10-year (or less) runway to exit the business and have not fully developed a transition plan or completed a business value assessment.

### Presenters

**Lizette Dubacher** | [Compass Point Consulting, Family Business Consultant](#)

Lizette Dubacher is a Family Business Consultant at Compass Point Consulting. She has 20+ years of corporate experience, in which she held leadership positions at Fortune 500 companies in the Information Technology and Financial Services industries as Business Unit Leader, Corporate Strategy Manager and Head of Strategic Planning. This experience allows her to support senior leadership in setting a clear strategic vision and driving successful implementation through simplifying key issues and building consensus across diverse cross-functional teams.

**Cheryl Doll** | [Compass Point Consulting, Family Business Consultant](#)

Cheryl Doll is a Family Business Consultant at Compass Point and works closely with owners and their leadership teams to build a strong foundation for continued success around the concepts of strategy, execution, leadership, talent, systems, profit, and core customer.

More information available at [mrcpa.org/events](https://mrcpa.org/events) or contact Nicole Pierce at [nicole.pierce@mrcpa.org](mailto:nicole.pierce@mrcpa.org).

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