

# Continuing Professional Development Certificate

## Succession planning from a Sole Practitioner into a Family Partnership

**Date:** Wednesday 31 May 2017

**Time:** 1.15pm - 2.00pm

**Speaker:** Filip Slipaczek, ACII, APFS

In this IIL lecture Filip Slipaczek described his career as a sole practitioner financial adviser and commented on the issues facing those who want to pass on the running of their business to the next generation.

Filip discussed the routes he had taken to differentiate himself from his peers; how to grow a business; how to avoid being the poor relation of other chartered professions; the traditional problems advisers face in succession planning and latest developments in that area and Filip's solution to succession planning.

By the end of this lecture members would have gained an insight into:

- Establishing a financial planning practice
- Growing the business
- Exit strategies including handing on the business to the next generation



This lecture or podcast can be included as part of your CPD requirement should you consider it relevant to your professional development needs. It is recommended that you keep any evidence of the CPD activity you have completed and upload copies to the recording tool as the CII may ask to see this if your record is selected for review.