

Succession Planning Professionals

TAKING YOUR BUSINESS TO NEW HEIGHTS.

A resource provided by the International Succession Planning Association®

GROUP CORE VALUES:

1. We welcome competition in the room. We believe competition makes us better and enriches discussion and meeting topics.
2. Members are required to bring something of value – bring an opinion and be willing to participate in discussion. Hosting and presenting/facilitating topics is a shared responsibility amongst the group.
3. Respect and consideration are essential for interactive group discussions. Overpowering, bullying or only attending to generate leads will not be tolerated behavior.
4. The group moderator or coordinator reserves the right to ask anyone to leave who is detrimental to a positive collaborative group environment
5. Membership in the group is selective and based upon certain criteria provided in the profile overview. Please review group criteria to ensure this is a fit for you.
6. Please only bring friends/colleagues who meet the criteria of the group/meeting.
7. Membership is based upon acceptance thru the Meetup.com system.

THIS GROUP IS FOR YOU IF YOU ARE:

- An advisor who works in or supports the business succession planning process or one of the areas listed in the Succession Matrix - (CPA, Business Coach, Attorney, Financial Advisor, Family Therapist, Strategic Planner, Family Advisor, Banker, Insurance Provider, Etc.)
- Looking for ways to connect with like-minded individuals within your community to learn, share, leverage resources and build relationships.
- Looking for quality interactions and discussion, not business card shuffling.
- Looking for tools and education to enhance business performance, value and goals.

Succession planning involves a diverse group of skill sets requiring a team effort amongst a group of advisors. Connecting with like-minded advisors in your area will enhance your knowledge, capabilities, and positioning in achieving your client's goals. Spread the word, and let's make **"Succession Planning Professionals"** group the exclusive community in the greater Des Moines area for professionals who are or want to be engaged in one or more aspects of the succession planning process. The goal of this group is to promote an environment for sharing ideas, leveraging resources and provide access to cutting edge professional development and marketing opportunities.

JOIN US!

To become a member of our group go to <http://www.meetup.com/Succession-Planning-Professionals-lowa-Chapter/> and hit the "JOIN US" button.

