Kenneth Portera- Succession Planning and How to Exit the Profession (2 CPE)

June 26, 2024 at 1:30 PM – Majestic Ballroom

Objective: To examine many of the issues surrounding the seasoned tax professional to help determine if they are ready to exit the profession and how best to develop a succession plan.

Topics this session will cover:

- Why you may be considering exiting the profession and if so then the following.
- Effects on client relationships
- Transfer of knowledge
- Identifying the right successor
- Employee continuity
- Personal readiness
- How artificial intelligence may play a role in your succession plan and your decision to exit the practice.

We will also look at the ways to develop a succession plan and some of the resources available to exit the profession.