



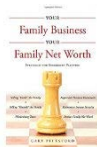
**BEACON HILL**  
FINANCIAL EDUCATORS

51A Middle Street Newburyport MA 01950  
Phone: 800-588-7039 Fax: 877-902-4284  
[contact@bhfe.com](mailto:contact@bhfe.com) [www.bhfe.com](http://www.bhfe.com)

**BEACON HILL *Course-in-a-Book™ Series***

*Succession Planning Strategies* #195216

CFP Board Course ID#222012



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**Course Information**

**NOTE:** For our *Course-in-a-Book™* titles only, the complete course includes a hard copy of the course-book and study guide (which includes a copy of the online exam questions), and access to the online exam.

The course-book is: *Your Family Business Your Family Net Worth* by Gary Pittsford.

*You need to own or have access to the above course-book in order to take the exam, which is based on the book.* If you do not own or have access to the book for this course, select the “Hardcopy Book and Online Exam” option when purchasing the course. You will be sent the book and study guide (which includes the online exam questions) in the mail. You will also have access to the online exam through your account.

If you already own or have access to the book, or you purchase the Kindle edition from Amazon.com, you may purchase the “Online Exam Only” at a reduced price (see the course description on our Website).

Contact us at [contact@bhfe.com](mailto:contact@bhfe.com) or 800-588-7039 if you have any questions.

**Course Description**

*Succession Planning Strategies* provides the tools for the practitioner to help business-owner clients who are contemplating retirement address the critical issues with respect to selling or passing on their business, determining the net worth of the business, safeguarding their net worth, addressing tax considerations, and planning for retirement.

**About the Author**

Gary Pittsford, CFP®, has over four decades of financial advisory experience and he understands that most business owners have a variety of questions when it comes to making a decision about selling their life’s work. Gary has been President and Chairman of the National Association of Personal Financial Advisors (NAPFA), on the board of directors of the International Association for Financial Planning (IAFP), and works closely with the National Cooperative Business Association (NCBA) and the United States Chamber of Commerce. He has also spoken at many national conventions, contributed to and written articles for industry-specific and national publications and received several accolades.

Number of CFP® continuing education credit hours recommended for this course: 4

Beacon Hill Financial Educators CFP Board sponsor number: 1008  
CLU, ChFC/PACE Recertification: 4 credit hours.

### Subject Codes

CFP Board: *General Principles of Financial Planning*  
NAPFA: *Financial Planning Process*

### Course content

Course Text: *Your Family Business Your Family Net Worth* by Gary Pittsford, 146 pages, ISBN 978-1-59932-593-4, Copyright © 2015 by Advantage Media Group.

Study Guide: Course information, learning objectives, d outline, final exam questions (as they appear on the online exam).

### Level of Complexity

Overview (programs that provide a general review of a subject from a broad perspective or dive into basic knowledge on a specific skill or topic. Best suited for CFP® professionals seeking knowledge in an unfamiliar subject area and with entry level experience.)

## Instructions for Taking This Course

Complete the course by reading the course-book (paying special attention to the learning objectives listed below) and taking the online exam. In order to receive CFP Board CE credit for this course, you must complete the course by achieving a passing grade of at least 70% on the online exam. Exams may be retaken if not passed on the first attempt (no charge).

### Instructions for Taking the Final Exam Online

- Login to your account online at [www.bhfe.com](http://www.bhfe.com).
- Go to "My Account."
- Select "Take Exam" for this course and follow instructions.

As an alternative, you may complete the exam offline and fax or email your answers using an answer sheet that is provided with the course study guide.

**Have a question?** Call us at 800-588-7039 or email us at [contact@bhfe.com](mailto:contact@bhfe.com).

## Learning Objectives

As a result of studying the course-book, you should be able to meet the following learning objectives:

1. Define the six major concerns one faces in planning for a business succession.
2. List the essential steps to take when preparing for a business transition.
3. Define the method for maximizing the value of a business prior to a transition.
4. Recognize the building blocks for achieving retirement security.
5. Define the issues that must be addressed when passing a business to a younger generation.
6. Define the issues that must be addressed with regard to non-family stakeholders who will be impacted by the business transition.
7. Determine the methods for valuing a business.
8. List the documents that are required as part of a business transition.
9. Recognize the key issues regarding the post-transition stage for the original owners of a business.

# Chapter List

Where Do You Begin?

Getting an Early Start

Maximizing Value

Retirement Income Security

The Next Generation

Beyond the Family Circle

What is Your Business Worth?

Normal Documents Needed

Managing Your Net Worth

Your Dream Team

For additional information on the book, see the [description](#) on Amazon.com.