



Family-Owned Business Event: “Succeeding in Succession”

When: Thursday 13th March 2025

Where: Bowcliffe Hall, Blackburn Wing, Bramham, Wetherby, LS23

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Planning for the future is essential for family-owned businesses.

Succession planning involves more than business strategy. Striking the right balance between preserving a family legacy and giving the next generation room to grow can be challenging.

While succession may seem far off for some organisations, those who address it early often achieve a smoother transition.

The recent budget has brought this topic into sharper focus, prompting many businesses to re-evaluate their long-term strategies.

To help family-owned businesses prepare, we’re hosting a concise, practical session on key legal and financial considerations, featuring insights from Clarion and Forvis Mazars, alongside client case studies.

Following the presentations, Martin Greig - Director of External Affairs, (FBUK), will facilitate further discussion on the most salient points.

Speakers:

Richard Moran, Senior Partner and Head of Corporate, Clarions

Jamie Rhodes, Private Client Tax Director, Forvis Mazars

Martin Greig, Director of External Affairs, FBUK (Chair)

Agenda:

08.30 - 09.00 Registration and breakfast

09.00 - 10.30 Presentations and discussion

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