



LIVE SESSION

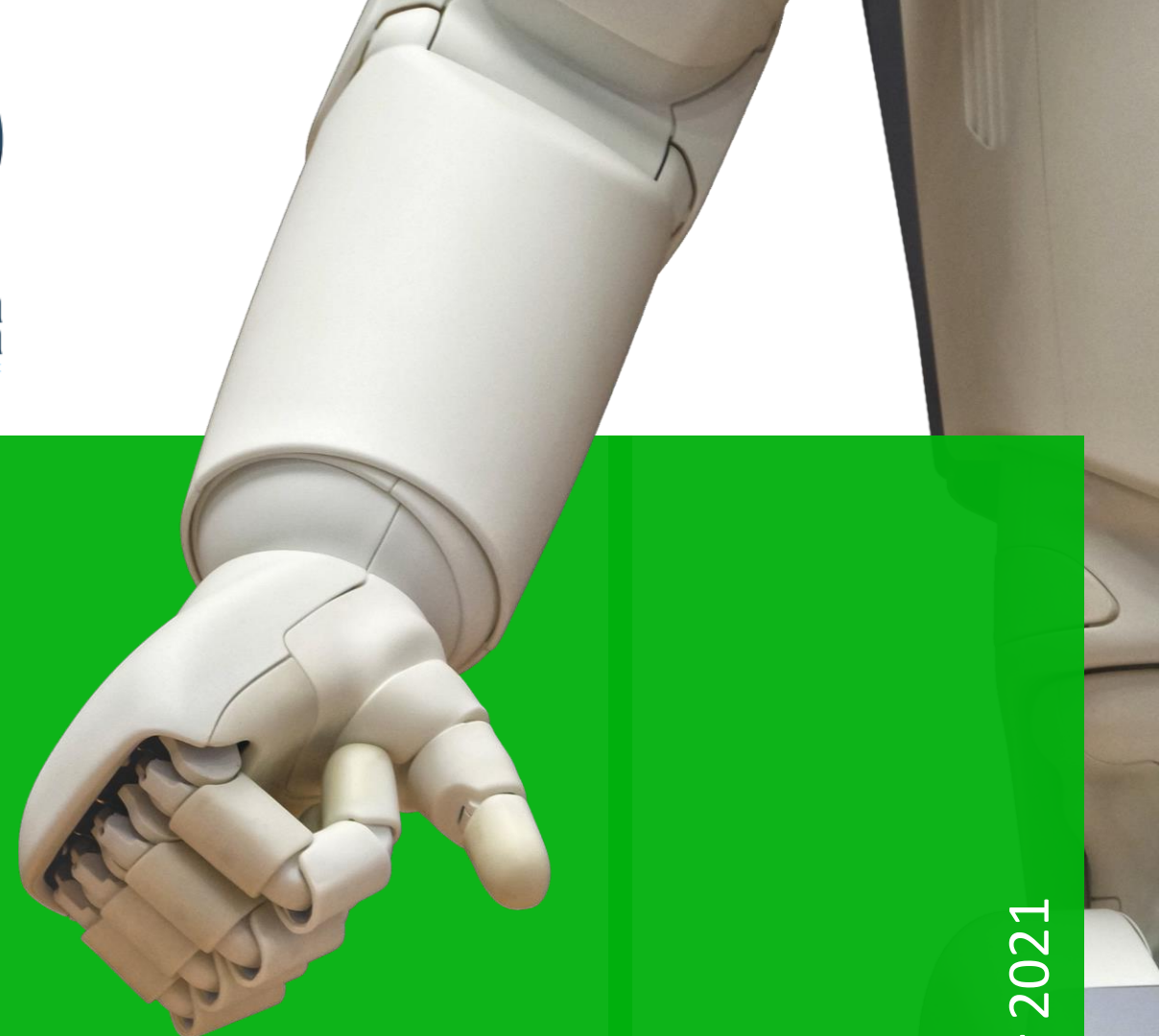
SUCCESSION



STARTING SOON...



WE LOVE WHEN WE CAN CONNECT WITH YOU



Partner Solution Series

Succession +

With Michael Jeffriess from
LightYear Docs + I Love Accounting

And Craig West from Succession +

LYD Partner Solutions Series

**PARTNER SOLUTION
SERIES WITH
MICHAEL JEFFRIESS**



**PARTNERS, SOLUTIONS,
PRACTICE MANAGEMENT,
APP STACKS AND MORE.**



Every second Thursday / 12:30pm AEDT

REGISTER [LIGHTYEARDOCS.COM.AU](https://lightyeardocs.com.au)



- LYD Partner Solution Series – launched in 2021
- Fortnightly webinars – Thursday
- A series of sessions run by LightYear Group Director and CEO of I Love Accounting – Michael Jeffriess
- Partner Solutions that complement LYD Strategies and Documents
- Plus insights into other areas such as technology applications and stacks, practice management, and many more.



Providing
Solutions,
Strategies and
Support to be
your **Best**

SUCCESSION PLUS



CRAIG
WEST

CEO & Founder, Succession Plus

Succession Plus is the largest Business Succession and Exit planning consulting firm in Australia and is entirely focused on designing and implementing successful exit strategies which achieve the owners' goals, release them from the business they have been so heavily invested in and provide the financial reward they deserve.

LYD Partner Solutions – LYD + Succession⁺ + ILA



SUCCESSION PLUS 



SUCCESSION PLUS



Succession Plus are specialists in providing proactive, focused and strategic advice for small to medium business owners in Australia, using our unique Intellectual Property and processes to manage strategic Business Succession & Exit Planning.

Founded by Craig West in 2009, Succession Plus is the largest consulting firm in Australia in this space with offices and partners in each capital city as well in the United Kingdom and New Zealand.

With head office in Sydney and 23 accredited advisers nationally, Succession Plus has worked with over 700 clients in the last 12 years.



BUSINESS VALUATION TOOL



SAY GOODBYE TO
EXPENSIVE & INEFFICIENT
VALUATION PROVIDERS





THE SUCCESSION PLUS VALUATION TOOL IS
COMPLETELY **CHANGING THE WAY** SME BUSINESS
VALUATIONS ARE DONE IN AUSTRALIA.

Now, accountants can prepare a special purpose valuation report online:

- In as little as **20 minutes**
- From as little as **\$250** per valuation report

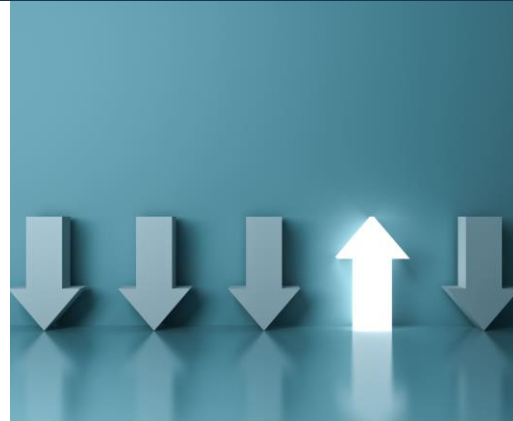
Valuation reports can cost between \$3,000 and \$30,000 depending upon the size and complexity of the business and the purpose.

WHAT ARE THE BENEFITS TO YOUR PRACTICE?



Save time with integrated data feeds...

a valuation tool that digitally talks to Xero.



You determine what you charge for your valuations...

and it goes to your Practice bottom line.



Take back control with in-house valuations

Why outsource when you can self serve online?

No loss of margin.

Efficiency.

Valuations can be prepared in less than 20 minutes.



No time to DIY?

You are supported by 23 Succession Plus advisers nationally.



Succession Plus has transitioned its tried and tested valuation tool into a digital environment, enabling a more streamlined and timely valuation service for our subscribers.

Succession Plus can interface real time through API connections drawing data from Xero. And if your client doesn't use Xero, you can still manually enter the data.

For future releases we will be adding benchmarking and risk assessment reports to the tool.

VALUATION TOOL 
LIVE DEMO



Q & A SESSION

TRY IT FOR FREE

VALUATIONS.SUCCESSIONPLUS.COM.AU



SUCCESSION+

1300 665 473

LOGIN

Do you know how much your business is worth?

We've teamed up with Xero to create a tool to accurately determine valuations for mid-market businesses. Find out what your business is worth with fast, easy integration.



CONNECT TO XERO FOR MY RESULTS

OR

COMPLETE A MANUAL VALUATION

[TRY XERO FOR FREE](#)



How our business valuation tool works

Our valuation tool works by analysing the current market factors and then assessing various risks – economic, industry and business specific risks – our algorithm uses this to calculate the “multiple.” We then complete detailed financial analysis to work out your Net Operating Profit after tax (NOPAT) adjusted for any one-off or abnormal expenses to provide normalised maintainable earnings. We also compare this with your net asset position (from your balance sheet) to ensure we have the most accurate result. Our findings and the underlying analysis is presented in a PDF report.

Coming up.....

- **Partner Solution Series**
 - Asset Protection + Restructuring with EO – Update
 - Marketing – What are your options
 - Practice Management
 - Funding Options for Clients
 - Incubator Mini Series
 - Client Profiles
 - Opportunities for investment

Contact Details



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