

The Miracle of Commitment

If you have decided to make succession planning a priority, we want to help you follow-through on that decision.

Fill in the information below and fax to us at (530) 345-7474. (Or scan and email to Info@Legacy-by-Design.com.) Kevin Spafford and the staff at Legacy by Design will follow-up to remind you of your commitment, and will contact you on the date you select to check on your progress, answer any questions you might have and help you take the next step.



Name _____
Operation _____
Email Address _____
Telephone Number _____

YES, we believe succession planning is important and want to make it a priority. By completing this form, we commit to take the next step in the succession planning process.

By _____, 2010
We commit to take the following action:

Put an X by the step you will take next, to fulfill your succession intentions.

- Seek out professional assistance
- Prepare for a family meeting
- Hold a family meeting
- Determine equitable shares
- Hire a Project Manager
- Get a plan in writing
- Other _____

X _____ X _____
Signatures **Date**

Legacy by Design, LLC | Ph: (877) 523-7411 | Fax: (530) 345-7474 | Legacy-by-Design.com
Email: Info@Legacy-by-Design.com | Complimentary Consultations



The Legacy behind the

