

THE SUCCESSION SOLUTION

**SPEAKER MEDIA KIT,
BRADLEY J FRANC**



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[@successionsol](https://twitter.com/successionsol)



www.thesuccessionsolution.com



francb@thesuccessionsolution.com

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MEET BRADLEY FRANCO

Bradley Franco is a seasoned entrepreneur, best-selling author, and business advisor. Bradley has also obtained the highest rating a lawyer can receive from the best lawyer evaluation process in the country. He is the creator of The Succession Solution and author of the best-selling book: "The Succession Solution: The Strategic Guide to Business Transition."

Bradley has founded four separate companies that have been named nine times in INC Magazine's list of fastest-growing companies in the U.S. He is a strategic business advisor who has led quarterly strategic meetings for well over twenty-five years.

Bradley has an extensive background in law and business, with 30 years of experience representing closely-held businesses in succession planning. He is a former president of Houston Harbaugh P.C., one of the top 20 largest law firms in Pittsburgh, Pennsylvania. Worth Magazine named him as one of the top 100 attorneys in the United States.

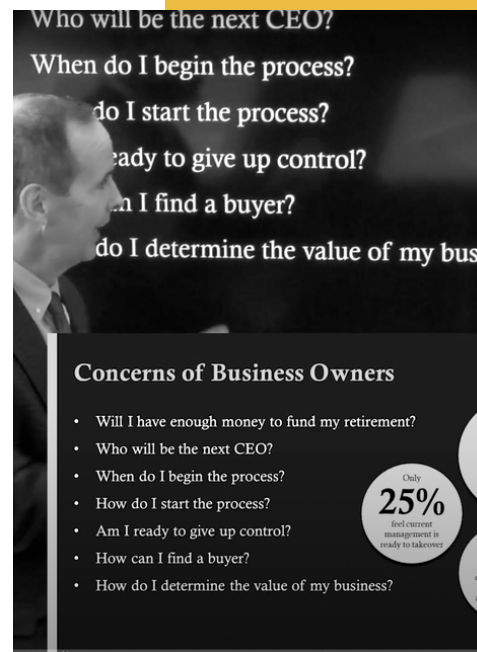
Bradley is a certified public accountant (current inactive status) and a graduate of Pennsylvania State University with a Bachelor of Science in Accounting. He also holds a law degree from the University of Pittsburgh School of Law, where he was a law review graduate.

In addition to his business ventures, Bradley is a sought-after speaker and has been featured on Bloomberg television, Sirius Radio, Young Presidents Organization, and other local radio and television programs. He has also been written about and published in Forbes, Fox News, U.S. News & World Report, and the United States Supreme Court.

THE HISTORY BEHIND THE SUCCESSION SOLUTION STORY

Inspired by his great grandfather, who immigrated from Pisa Italy with nothing but the clothes on his back, and started a successful business, Brad has always had a passion for helping closely-held businesses succeed for multiple generations...

[CLICK THIS LINK](#) AND SCROLL DOWN FOR THE FULL AMAZING STORY



THE SUCCESSION SOLUTION

PRODUCTS AND SUBJECTS

Individualized succession / transition / legacy planning for your business: Survive and thrive in the transition to the next generation.

The Succession Solution is the premier succession planning program designed to secure the future of your closely-held business.

Bradley is frequently invited to speak at conferences, seminars, workshops and on podcasts as a highly established expert in this field.

[Click to read a comprehensive description of what to expect from the program](#)

TRAINING COURSE

Bradley has created a training course where experienced, financial advisors, attorneys, CPAs, and other business advisers are invited to join the **Succession Solution Certification program** and become a certified Succession Solution Planner Adviser for business owners.

Bradley is available to speak at conferences and webinars for the aforementioned advisors, regarding becoming certified and the value it brings to clients.

[Click to find out more about this course and here from certified professionals](#)

BEST-SELLING BOOK

The Succession Solution: The Strategic Guide To Business Transition

[Click to download the Kindle version for free](#)



THE SUCCESSION SOLUTION

MEDIA AND SPEAKING APPEARANCES

Bradley Franc speaking at the **YPO Event** on **The Succession Solution**.
[Click here for full presentation](#)

FURTHER SPEAKING ACCREDITATIONS

YPO on Succession Planning

YPO Gold on Succession Planning

YPO International Forum on selling your business (from start to finish)

Western Pennsylvania Tax Conference on Succession Planning

The Pennsylvania University Annual Tax Conference on Succession Planning

Host and co-creator of business planning program for KQV radio

Guest host for succession planning program for WMBS radio

Guest on Bloomberg television on tax planning

Guest on Sirius XM Radio on estate planning young adults

Guest host on KDKA television on business planning for new venture

PODCASTS

[The Deep Wealth Podcast: Brad Franc On Why Succession Planning Today Has You Prosper Tomorrow](#)

[The Business of Family: Increase the Value and Maintain the Values](#)

[SMART Real Estate Podcast: The Importance of Succession Planning, with Bradley Franc](#)

[Leadership & Business Podcast Brad Franc Episode 137](#)

[Family Business Today: Episode 22: Surviving the Business Transition with Brad Franc](#)



THE SUCCESSION SOLUTION

ARTICLES

[Why Business Succession Plans Fail And How To Beat The Odds](#)

[Planning Helps Put the Success in Succession, by Cynthia Lescalleet](#)

[Business Interviews - Brad Franc](#)

[The Succession Conundrum, by David Ward](#)

[Pittsburgh Business Times: Succeed where most fail in continuing your company's legacy](#)

CONTACT US

BRADLEY FRANC

FRANCB@THESUCCESSIONSOLUTION.COM

WWW.THESUCCESSIONSOLUTION.COM

+1 (412) 298-3336

This article was originally published in "Ignite," the flagship publication of YPO. YPO is the global platform for chief executives to engage, learn and grow, encompassing more than 25,000 members in more than 120 countries, diversified among industries and types of businesses.

PLANNING HELPS PUT THE SUCCESS IN SUCCESSION

By Cynthia Lescalleet

THINK OF TRANSFERRING YOUR FAMILY BUSINESS to the next generation as a process, one that benefits from having a tangible succession plan in place — instead of just having one in mind.

HAVING A DEFINED succession plan in place for a closely held family business can improve the chances that the transfer of ownership or management to the next generation will be a smooth and successful one.

In his work as a succession planning specialist, attorney and former CIA, Brad Franc (YPO Gold Pittsburgh) of Houston Harbaugh cites some daunting statistics on the transfer success rate: less than 30 percent of family businesses survive changing hands between the first and second generations. The rate drops to 17 percent by the third generation and declines to 3 percent by the fourth generation.

Additionally, of the 80 percent of business owners who intend to transfer their company to the next generation, only 30 percent do so, he says. Of the 30 percent who do, however, 84 percent succeed — when they have a plan.

"What those statistics tell us is that a business owner can dramatically improve the chances of a successful succession by developing a plan," says Franc, who deploys a planning system he developed, called "The Succession Solution."

Given these transfer success rates, he suggests it is little wonder that YPO members — especially those whose

businesses have not reached YPO Gold status — responded a bit more anxiously about their succession planning efforts (avoidance) in an informal, international poll conducted in 2013 as part of research for his planning book, also entitled "The Success Solution."

Franc says his member survey found that owner mistakes in the next generation are the failure to plan or to know they need to plan. Most even want to know they need to plan. Most even want to know they need to plan. Most even want to know they need to plan.

They just do not know how to develop the plan more often, how to get the plan they carry in their heads into something tangible in writing. The primary reasons businesses don't make it to the next generation are the failure to plan or to know they need to plan. Most even want to know they need to plan. Most even want to know they need to plan.

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Brad Franc



26 IGNITE

PITTSBURGH BUSINESSTIMES

Succeed where most fail in continuing your company's legacy

Most closely held business owners realize the succession of their business will transpire whether the owner likes it or not. The succession of their business is as certain as death and taxes, which also come about in many transfers.

The succession choices available to the business owner are typically limited to the following: close the business, sell the business to a third party or a group of employees, or transfer the business to the next generation of family members.

Unfortunately, even though more than 80 percent of business owners intend to transfer their business to the next generation, only about 30 percent accomplish their objective. By examining what has and has not worked for others, the business owner can increase his or her chances of success.

Regrettably, less than one-third of family businesses survive the succession to the second generation, 12 percent to the third, and a meager 3 percent make it to the fourth generation and beyond.

An examination of successful multigenerational families shows their use and recognition of two

fundamental succession strategies. First, successful family businesses follow a process for succession. Importantly, there is no one particular "best process" to follow. Rather, the multigenerational family business selects a process for succession and then executes on the process.

One proven process is where the owner first inventories his business, personal and financial situation. Next, the owner identifies the business and personal risks inherent in their business and the contemplated transfer to the next generation. Once the risks are identified, the owner can begin to develop solutions to avoid or at least mitigate the risks. Once the solutions are acknowledged, the owner develops an outline of what he wants to accomplish and over what time frame.

As part of this process, the owner should have a team of professional advisers. This may consist of the owner's accountant, attorney or financial planner. A team of experienced professionals can help identify legal, tax and financial issues of which a business owner may not be aware and offer options to consider in order to successfully transfer the business. A business owner may go through this process once or twice in their life, but an experienced professional will likely have gone through similar processes hundreds of times.

The second strategy acknowledgement and recognition of the family dynamics involved is a large body of evidence that most failures in the succession of a business to the next generation are the result of the failure to address the concerns of all affected members.

Three common and important systems are family owned business. How will the impact these three separate overlapping systems, and the transition be structured to protect everyone while allow business to flourish? A family business is a fifth-generation business once stated that a family may be entitled to ownership involvement in management to be earned. It is this type of process that must be employed.

Most business owners do not understand their business and family systems are unique and, to some extent, are correct. That is why one best single succession strategy is unique and, to some extent, are correct. That is why one best single succession strategy is unique and, to some extent, are correct.

Regardless, there are basic principles which, when employed, increase the chances of a successful transition. Bradley J. Franc is a fifth-generation business owner who, with Houston Harbaugh, developed The Succession Solution, a blueprint for helping chief executives transfer their businesses to the next generation to the next.

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