



Nassau Chapter Practice Continuity and Succession Meeting
Friday, October 27, 2017, 8 A.M.

The Vital Role of Marketing in Succession Planning
Presented by Edie Reinhardt
2 CPE Credits

Edie Reinhardt is Principal of RDT Content Marketing LLC, a marketing consulting firm specializing in helping professional services firms grow their business. She works with CPA, law and financial services firms to increase their name recognition, position themselves as industry experts, and stand out from the competition. As a former practicing attorney, Edie understands the marketing challenges of these firms and their concerns about the image they want to present. Edie will be discussing how and why marketing plays a vital role in succession planning, including:

- **why marketing should be a part of succession planning considerations early in the process;**
- **the steps needed and talent required to make any transition as smooth as possible to all internal and external audiences;**
- **changes in the accounting profession, including changes in options for succession, how firms will operate in the future and making a transition with GenX and Millennials as well as the importance and retention of female staff, and;**
- **why marketing and business development is important to firm leadership.**

All Nassau Chapter members concerned about the future of their practices are welcome to attend and participate in this meeting.

Location: On Parade Diner

(7980 Jericho Turnpike, Woodbury New York, 11797 phone # (516) 364-1870).

Cost: \$25.00 per person, paid in advance. Includes full breakfast.

(\$30.00 for pre-registrations and others paying at the door - no exceptions).

Please email your intentions to attend (email ginette@morriscpas.com), make checks payable to NYSSCPA-Nassau Chapter and mail to:

Craig Morris & Company

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