
Small Credit Union Group Workshops

Succession Planning



Planning for your success.

www.successionapp.com



Easily Create Your CEO/Manager and Board of Directors Succession Plans!

Succession planning is essential - especially now with the new NCUA succession planning rule - but for many small credit unions, it often feels overwhelming, expensive, or time-consuming. Our *Small Credit Union Group Workshop* is designed to change that. These workshops make it easy for small credit unions (<\$75M in assets) to create a strong, actionable board and CEO/Manager succession plan - without the high cost or complexity. Guided by our experienced consultants and powered by our award-winning SUCCESSIONapp® software, you'll be able to quickly complete your plans with clarity and confidence.

Our *Small Credit Union Group Workshop* includes two sessions. First, a 2-hour virtual group session where you'll be guided step-by-step through the planning process alongside other small credit union leaders. The program also includes a 30 - 60 minute private session with one of our SUCCESSIONapp® consultants to review the results of your plan and answer questions. You'll leave the process with a complete, customized succession plan and peace of mind knowing your credit union is prepared for the future.

Read on to learn more about the program's details and how this guided workshop can help your credit union meet the new NCUA succession planning requirements!

NCUA Succession Planning Requirement

The National Credit Union Administration (NCUA) unanimously approved a final rule on succession planning, requiring all federally-insured credit unions to have written succession plans for key positions by January 1, 2026.

What is Required in the Ruling?

The ruling requires that all federally-insured credit unions have written succession plans in place by January 1, 2026. These plans must be created for all key positions, which includes the following:

- Members of the Board of Directors.
- Management officials and assistant management officials.
- Any other personnel that the board deems critical given the credit union's size, complexity and risk of operations. (This can include new positions that may be required due to planned changes in operations, supervisory landscape, or corporate structure.)

At a minimum, the written succession plan must contain the following information for each of the key positions listed above:

- The title for each covered position.
- The expiration of the incumbents term (if they are serving in a term-limited capacity) or their anticipated vacancy date (for example, the incumbent's expected retirement date).
- The credit union's plan for permanently filling vacancies for each of the covered positions.
- The credit union's strategy for recruiting candidates with the potential to assume the position.
- An estimate of the budgetary impacts of executing the succession plan. (An exact figure is not required.)

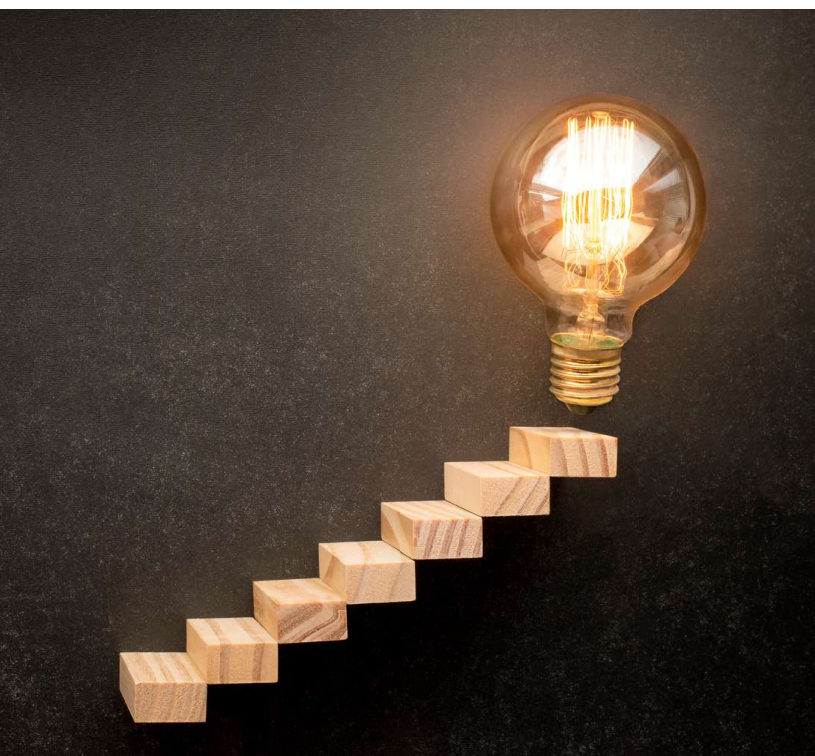
The board of directors is expected to:

- Approve the written succession plans that meet the requirements above.
- Review, and update as necessary, the succession plan in accordance with a schedule decided on by the board of directors but no less than every 24 months.

The ruling also adds succession planning to the list of items that directors must be familiar with within six months of their appointment to the board.



Advantages of Joining Our Succession Planning Workshops



- ✓ **Save Time and Avoid Overwhelm:** With our guided program structure and expert support, you'll complete your CEO/Manager and Board Succession Plans in just two easy sessions!
- ✓ **Meet NCUA Requirements with Ease:** Quickly create a compliant succession plan that aligns with the new succession planning rule.
- ✓ **Learn Alongside Your Peers:** Gain insights and ideas from other small credit union leaders who face similar goals in terms of succession planning.
- ✓ **One-on-One Expert Review:** Receive one private session with our succession planning experts to ensure your plan is complete, customized, and compliant!
- ✓ **Hands-On Access to Award-Winning Software:** You get access to our secure and easy-to-use platform, SUCCESSIONapp®, to build and store your succession plans.

Small Credit Union Workshop Details

- Package Deal - Create your credit union's CEO/Manager and Board Succession Plans in two quick sessions!
 - Learn more about the [session agenda here!](#)
- Who Can Attend The First Session:
 - CEO/Manager
 - Up to 2 Board Member Representatives
- 2 Sessions Total:
 - First Session - With the Full Group: 1.5 - 2 Hours in Length
 - Second Session - Private with SUCCESSIONapp® Consultant: 30 minutes - 60 minutes in Length
- All sessions held via Zoom.
- Available to Credit Unions with Assets Under \$75M.
- Group workshops will be limited to a maximum of 20 Credit Unions per group (to allow for questions and personalized help).
- Program Fees: Total Investment = \$2,500 (*Includes CEO/Manager and Board Succession Planning*)
 - Annual Licensing Fee for the use of the SUCCESSIONapp® Software: \$1,500 *Normally Priced at \$4,250*
 - Program Training & Facilitation Fee: \$1,000 *Normally Priced at \$4,750*

Succession Planning Expert

Founder/CEO Bio

Hi! I'm **Yvonne Evers**, founder and CEO of SUCCESSIONapp, LLC.

I've worked with **hundreds of organizations** over the last 25 years. My career began in human resource consulting and then grew into more of a focus on succession planning and executive coaching.

I have coached many CEOs and management teams on succession planning. **This is my passion!** I want organizations to be ready for the future - especially since the future includes a lot of turnover in the executive ranks and on your board of directors.

I have researched and created an online solution called **SUCCESSIONapp®** that makes succession planning incredibly easy for your organization! I am proud to combine my expertise and passion to help credit unions like yours approach succession planning with clarity and confidence!



Interested in Joining Our Small Credit Union Group Workshops?

Learn More Here!

Contact Us!



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