

2025 Financial Management Conference

Succession Planning

Moderator, Dana Moore, Compass Advisors

Special guest **Michael Pruell**

Chris Cherry, Chief Financial Officer, Wesley Housing

Cindy Holler, Chief Executive Officer, Community Housing Capital

Lorraine Gordon, Founder & Managing Director, Lead with Heart, LLC

Sept. 17, 2025

STRENGTHMATTERS[®]



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Agenda

- Introductions
- Review **Learning Objectives**
- Overview of session plan and timing
- Q&A
- Wrap up

Learning Objectives

- Review a framework for successful succession planning will be provided along with implementation requirements (coaching, goals, accountability) for ensuring plan traction.

Questions

- We will pause during presentation and again at the end for Q&A but will start the session by asking you a question.

Polling Question 1

- *Does your organization have a succession plan in place? By show of hands after each possible answer.*
 - A. Yes
 - B. No

- *How deep into the organization does your plan...plan?*
 - A. C-Suite only
 - B. Sr Staff
 - C. All managers
 - D. Other

THE OBJECTIVES OF SUCCESSION PLANNING

IMPROVING RETENTION

EMPLOYEE DEVELOPMENT
AND ENGAGEMENT

Enhancing Culture

BUSINESS CONTINUITY

PRESERVING KNOWLEDGE

Assess Cultural Needs of Organization



SUCCESSION PLANNING



Build into goals and review regularly

Use of consultants and executive coaches

Polling Question 2

- *Do you have written development plans in place for key staff? By show of hands after each possible answer.*

A. Yes

B. No

Polling Question 3

- *Are your development plans tied into annual goal setting? By show of hands after each possible answer.*

A. Yes

B. No

Polling Question 4

- *Does your organization provide executive coaching support as part of development plans? By show of hands after each possible answer.*
 - A. Yes
 - B. No

Polling Question 5

- *Are you at Strength Matters as part of a networking strategy to support your succession planning efforts? By show of hands after each possible answer. (Yes, a shameless plug.)*

A. Yes

B. No

Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

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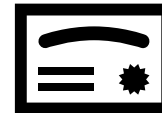
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