



Instructor: **Jamie Mayes**, Senior Vice President and Senior Relationship Manager in Business Banking, at Bank of America Merrill Lynch, delivers strategic financial advice and proactive solutions to companies in Oklahoma.

**BIS BROWN BAG SERIES**

**Keys for Successful Succession Planning**

Creating a succession plan is about protecting your business' future and preventing service disruption and the loss of institutional knowledge. It involves ensuring there are strategies in place so the business continues to realize value and stay competitive as the founder, executive leadership or knowledgeable, long-time employees exit. Instead of reacting to circumstances such as retirements or sudden disability, business owners and leadership can make proactive decisions with a detailed transition plan.

Join ICTC and Bank of America Merrill Lynch to learn the key factors involved with an effective succession plan. Bring your lunch or grab a bite to eat from ICTC's cafeteria. (Cash only.) Co-sponsored by the Muskogee Area Human Resources Association (MAHRA).



Instructor: **Steve Udrisky**, joined Merrill Lynch in 2005 and is a founding member of Clack, Jelley, Udrisky & Associates. He focuses on offering advice and guidance to individuals and families about retirement planning, wealth transfer and wealth preservation strategies.



**TUES, Jan. 23 | Noon-1pm | Free admission**

**ICTC Muskogee | 2403 N. 41st Street East, BLDG. C, RM 100**

**CONTACT TO REGISTER**

**April C. Murelio, Industrial Coordinator**  
**April.Murelio@ictctech.com | 918-348-7945**

**BUSINESS & INDUSTRY SERVICES**  
**Kathy Adair, Director**  
 kathy.adair@ictctech.com  
 www.ictctech.com

**MUSKOGEE CAMPUS:** 2403 N. 41ST ST. E, Muskogee 74403  
**SALLISAW CAMPUS:** 401 E. Houser Ind., Blvd., Sallisaw 74955  
**STILWELL CAMPUS:** Hwy. 59 N. by Maryetta School, Stilwell 74960  
**TAHLEQUAH CAMPUS:** 240 CareerTech Way, Tahlequah 74464