

Sample Partner Transition Plan

(a worksheet from *Securing the Future: Succession Planning Basics*, copyright © AICPA 2010)

Partner Name: _____ Planned Retirement Date: _____ Years until Retirement (3, 2 or 1): _____

Client Name: _____ New Client Service Partner: _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

12 th Qtr	11 th Qtr	10 th Qtr	9 th Qtr	8 th Qtr	7 th Qtr	6 th Qtr	5 th Qtr	4 th Qtr	3 rd Qtr	2 nd Qtr	1 st Qtr

Client Name: _____ New Client Service Partner: _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

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Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

12 th Qtr	11 th Qtr	10 th Qtr	9 th Qtr	8 th Qtr	7 th Qtr	6 th Qtr	5 th Qtr	4 th Qtr	3 rd Qtr	2 nd Qtr	1 st Qtr

Client Name: _____ New Client Service Partner: _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

Planned Action/Activity: _____ Date: _____ Done Properly (Y/N): _____

12 th Qtr	11 th Qtr	10 th Qtr	9 th Qtr	8 th Qtr	7 th Qtr	6 th Qtr	5 th Qtr	4 th Qtr	3 rd Qtr	2 nd Qtr	1 st Qtr

*** Indicate (Y or N) whether the partner has meet the transitioning requirements for each quarter, shown as duration until retirement**

