PASS THE BATON

A 12-Month Online Succession Planning Series for Family Businesses and Farming Families

OVERVIEW

Succession planning is rarely just about legal documents or tax structures. It usually involves family relationships, retirement security, business viability, fairness between children, and the confidence to make decisions that may have been avoided for years. Delivered fully online, this series is designed as a practical, structured first step for families who know they need to begin the conversation.

PROGRAM ELEMENT	DESCRIPTION
Delivery format	Fully online — 6 live sessions over 12 months
Session length	90 minutes each
Fee	$6,000 per family
Advice basis	General advice only
Included family meeting	1 private family meeting at the end of the program
Next-step benefit	20% off Catapult Wealth succession planning services when you proceed after the program

Complete the fully online program and a dedicated final family meeting, then receive 20% off Catapult Wealth's succession planning service if you choose to proceed.

What the Series Covers

CatapultWealth

Session 1 — The Big Picture

Starting the conversation: family alignment, what success looks like, common blockers, and the difference between fair and equal.

Session 2 — The Dead Plan

What happens if something happens tomorrow: wills, powers of attorney, control, insurance, risk management and off-farm children issues.

Session 3 — The Retirement Plan

How the senior generation gets secure without handcuffing the business: income needs, housing, super and non-farm assets.

Session 4 — The Management Plan

Who will run the business, when responsibility changes hands, what capability gaps exist, and what practical handover steps can begin now.

Session 5 — The Cheque Book Plan + Land Plan

Who controls the money, who can make major decisions, and how land ownership, timing and structures may evolve over time.

Session 6 — Off-Farm Kids, Fairness and the Roadmap

How to include non-active family members, reduce resentment, strengthen governance, and identify the next right advisory steps.

Who is it for

- Family businesses and farming families who know they need to start or restart the succession conversation.
- Families wanting a lower-pressure, structured entry point before moving into tailored advice.
- Parents and next-generation members who need a clearer framework for discussing management, retirement, ownership and fairness.

What Families Will Gain

- A clearer understanding of the major succession issues they need to address.
- A better framework for family conversations and decision-making.
- A practical view of the gaps in their current planning.
- More confidence about the next right steps and when tailored advice may be needed.
- A dedicated family meeting at the end of the program to bring key priorities together and agree on the next steps.

How Each Session Runs

- Welcome and recap
- Teaching / practical input
- Guided reflection questions
- Examples and common traps
- Action prompts and take-home homework

REGISTER TODAY!

Contact Lauren at lauren@catapultwealth.com.au or call (08) 8172 9111 to register.

Your Presenters

At Catapult Wealth, Tony Catt and Lauren Brinkmann work together to help family businesses navigate succession planning, governance and long-term strategic decision-making. Combining decades of professional experience with strong personal connections to agriculture and family business, they bring both practical expertise and genuine understanding to what can often be one of the most significant transitions a family will face.

Tony and Lauren recognise that successful succession planning is about far more than legal documents and financial outcomes. It involves balancing family relationships, individual aspirations, retirement needs, business sustainability and the preservation of a legacy built over generations. Their collaborative approach helps families move from informal discussions to structured plans that provide clarity, confidence and direction for the future.

Tony Catt

Director/ Financial Adviser

Tony's passion for succession planning stems from personal experience after marrying into a large farming family from Renmark, where he gained firsthand insight into the opportunities and challenges involved in transitioning a family enterprise. With more than 28 years of experience across accounting, investment research, stockbroking and financial planning, he brings a broad strategic perspective to complex family, business and wealth discussions. As a Director of Catapult Wealth, Tony works closely with families to develop practical succession strategies and establish advisory boards that strengthen governance, improve accountability and support better decision-making across generations.

Lauren Brinkmann

Succession Planner

Lauren's connection to succession planning is equally personal. Raised on her family's broadacre cropping farm on the Yorke Peninsula and still actively involved in the family business today, she understands that a farm represents far more than a balance sheet. Before joining Catapult Wealth as a Succession Planner, Lauren spent 14 years in agribusiness finance, supporting farming clients through periods of growth, change and uncertainty. Her experience provides valuable insight into the financial, operational and personal factors that influence successful succession outcomes. Lauren is passionate about helping families have meaningful conversations, align expectations and create practical pathways that support both family harmony and business continuity.