

Generational Change: Preparing for the Inevitable

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Executive Summary:

This presentation from the annual Competitive Challenges Conference helps senior executives at asset management firms for leadership transitions. Here are the key takeaways:

- Manage the process — Proactively manage leadership changes (CEOs, Founders, functional heads, PMs, etc.) to avoid negative and lasting repercussions with clients, prospects and consultants.
- Develop a succession plan — Set future leaders up for success by thinking ahead, involving the right people, developing agreed candidate criteria, and adhering to a disciplined succession process.
- Communicate effectively — Provide a transparent and fair process for the candidates and employ proactive client communications to minimize and allay investors' concerns.



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