



Transition Planning Program Application

Program support:

This program is part of the BCSGA program for Shellfish Farmer Transition Planning – please review the available guidance and transition planning documents on the BCSGA website: <https://bcsga.ca/transitionplanning/>. As part of this program there is up to \$1,500.00 in direct support for BCSGA from MNP on their transition planning.

MNP Transition Planning Support :

MNP is pleased to provide specialized transition planning support for members of the BC Shellfish Growers Association. Our team will meet with you to review your current financial position, discuss your goals for exiting or selling the business, and assess—at a high level—whether your business structure may qualify for available tax benefits. We'll also help outline next steps in your transition journey and identify areas that may need further planning or support.

What to Expect:

The meeting will include a discussion of your business plans, a review of key financial information, and guidance on potential tax planning opportunities.

Client Preparation:

To make the most of this session, we ask that you bring current and up-to-date financial documents, including recent financial statements, corporate/personal tax returns for the last 3 years, and corporate structure details (e.g., shareholdings, ownership changes, etc.).

Contact Information:

For questions or to submit your documents ahead of the meeting, please contact:

MNP LLP

Karen Guinan (Karen.guinan@mnp.ca) and Sarah Witherow (Sarah.witherow@mnp.ca)
250-338-5464

To apply and participate:

To apply to this program please submit this completed application form and the **Shellfish Farmer Transition Planning Self-Assessment** (You don't need to know every answer or have all the documents ready, but it is a good place to identify your gaps and areas of support for transition planning) to Malcolm@bcsga.ca. If your application is accepted the BCSGA will provide a contribution for the funding and support from MNP. This agreement will be signed by both parties and include the details for your participation in the program.

Application:

Company Name: Click or tap here to enter text.

BCSGA Membership Name (if different): Click or tap here to enter text.

Contact Name: Click or tap here to enter text.

Contact Email: Click or tap here to enter text.

Contact Phone Number: Click or tap here to enter text.

Describe your current transition plan, support required, and timeline:

Signing Application and Acknowledgments:

By signing below, the applicant understands and accepts the following program requirements:

- Understand and have review the program information in this document and on the BCSGA website
- Hereby declare that the information provided in this application is true and correct in every respect.
- Have signing authority on behalf of the recipient and am / are British Columbia resident(s) over 19 years of age.
- The recipient must remain a BCSGA member in good standing to receive the contribution.
- Submission of an application does not guarantee funding or approval
- Unless otherwise stated in writing it is at the sole discretion of the BCSGA to interpret the terms and language in this agreement.
- Understand that personal information on this form is collected under the Freedom of Information and Protection of Privacy Act, s.26(c)
- Consent to the public release of your participation in this program and use of this document as a project deliverable.
- Agree to participate in an evaluation and / or audit of the program

Name: Click or tap here to enter text.

Signature:

Date: Click or tap here to enter text.