

Erben Associates President Jim Erben Publishes New Book on Business Succession Planning

Succession by Design examines succession planning, business continuity and financial preparation for privately held business owners

AUSTIN, TX, UNITED STATES, July 28, 2026 /EINPresswire.com/ -- Erben Associates announced today [the publication of](#) *Succession by Design: How Visionary Leaders Prepare Their Organization for What's Next*, a new book by firm President Jim Erben focused on helping privately held business owners prepare for succession and other major business transitions.

Published by Mission Driven Press and distributed by Simon & Schuster, *Succession by Design* draws on Erben's more than 30 years of experience working with business owners on succession, business continuity and related financial planning issues.

The book addresses decisions business owners may face when preparing to sell a company, transition ownership to family members or employees, retire, or prepare the organization for an unexpected leadership change. Topics include developing a written succession plan, determining and improving business value, aligning personal financial needs with an eventual exit, establishing business continuity and emergency operating plans, and coordinating the advisors involved in the planning process.

"Business owners spend years making decisions that build value, but the decisions surrounding an exit or succession can ultimately determine how much of that value is preserved and what happens to the people who depend on the business," said Erben. "The goal of this book is to

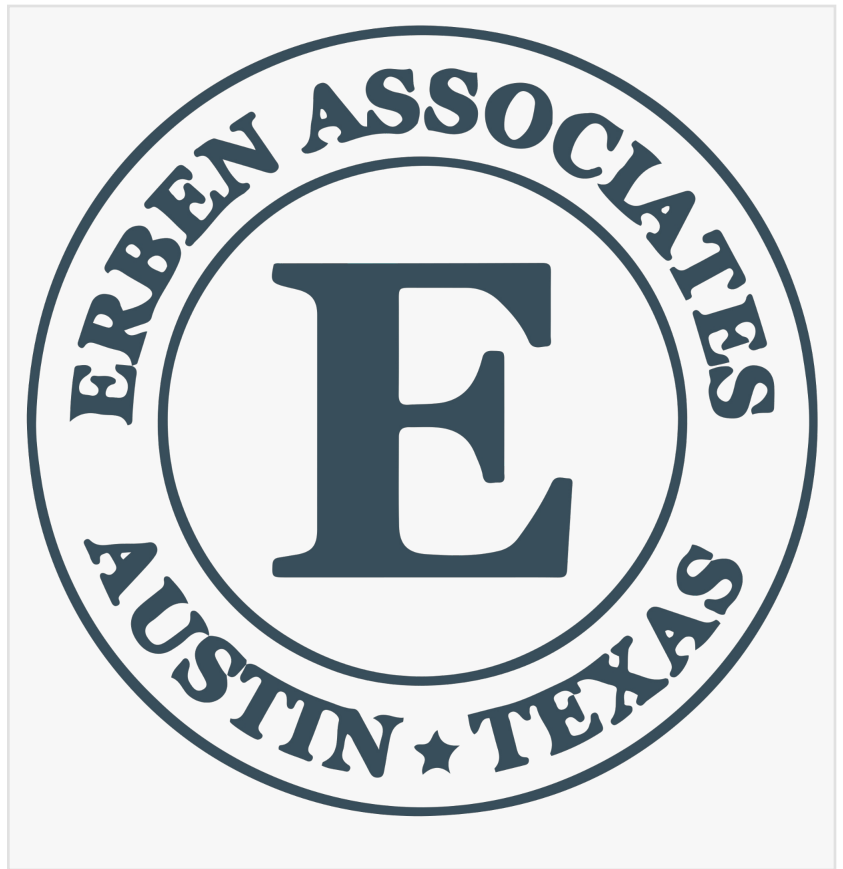


Jim Erben, Erben Associates

help owners think about those decisions earlier, bring the right people together, and create a plan that allows them to move forward with clarity and confidence.”

Succession by Design also discusses the relationship between a business owner’s company and personal financial planning. Among the concepts Erben introduces is the “Happily Ever After Wealth Number,” a framework for considering the personal wealth an owner may need to support his or her goals after leaving the business.

The book reflects issues Erben has encountered throughout his career advising privately held business owners. His focus on succession planning was influenced in part by an early experience involving a business owner who experienced a serious health crisis without a clear plan for ownership, leadership or transition. The situation demonstrated how the absence of a succession plan can affect a company, its employees and an owner’s family.



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Jim Erben, Author, Succession by Design

That experience helped shape Erben’s work at Erben Associates, where the firm focuses on exit and succession planning for business owners and high-net-worth individuals. The firm frequently works alongside clients’ attorneys, CPAs, investment advisors and other professionals to coordinate business and personal planning considerations.

“Planning for a transition should not begin when an owner

is already standing at the exit,” Erben said. “The earlier you understand what the business is worth, what you need personally, who needs to be involved, and where the risks are, the more options you have for determining what comes next.”

Succession by Design includes examples illustrating succession and continuity challenges faced by business owners, as well as planning considerations for owners at different stages of a potential transition.

Succession by Design: How Visionary Leaders Prepare Their Organization for What's Next is available in hardcover and eBook formats beginning July 28, 2026. More information about the book is available at SuccessionByDesignBook.com.

About Jim Erben

Jim Erben is President of Erben Associates and an exit and succession planning specialist with more than 30 years of experience working with privately held business owners. His work focuses on succession, business continuity, executive retention, business value and the financial considerations surrounding ownership transitions.

Erben holds a Master of Science in Financial Services from The American College and the Accredited Estate Planner® (AEP®) designation. He is also an international speaker on exit and succession planning, business continuity and executive retention. Succession by Design is his first book.

About Erben Associates

Erben Associates is an Austin, Texas-based financial planning firm focused on exit and succession planning for business owners and high-net-worth individuals. Founded in 1992, the firm helps clients coordinate business value, personal wealth and long-term planning considerations.

Erben Associates works with clients and their existing attorneys, CPAs, investment advisors and other professionals to help align decisions across the advisory team. Its work includes exit and succession planning, asset management, retirement plan analysis, personal wealth and estate planning, life insurance, risk analysis, legacy and family continuity planning, and tax planning.

The firm's [Succession by Design, Not Default®](#) approach emphasizes preparing for ownership and leadership transitions before circumstances require them. Erben Associates is headquartered in Austin, Texas. For more information, visit ErbenAssociates.com or call (512) 402-0250.

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