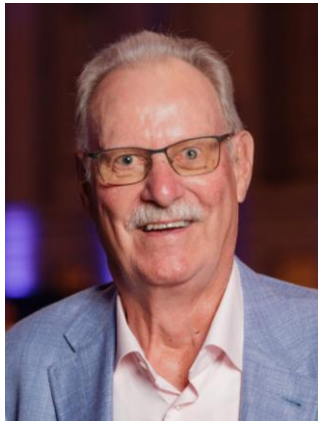


2026 CERIFIED ENERGY EXPERT NATIONAL MEETING

SUCCESSION PLANNING | PANEL



Renee Wilson
Rockweiler Insulation
Wisconsin



Gary Rockweiler
Rockweiler Insulation
Wisconsin



Rich & Amy Reichel
Reichel Insulation
Minnesota

Facilitator



Joe Arrigo
Resource Development Partners
Colorado

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Building Continuity Without Losing Control

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CLEAR SUCCESSION PATH OPTIONS

- Awareness of personal, legal, and financial trade-offs
- Peer-tested questions you should be asking



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Setting the Context:
Why Succession Planning is Personal

- Most owners wait too long
- Succession ≠ Exit
- Bad transitions destroy value; good ones protect people, culture, and cash flow

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Family Dynamics & Ownership Fairness

Equal is Rarely Fair

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Succession Paths & Transition Models

There is No “Standard” Succession Plan

- Next-generation family leadership
- Key employee or management buy-in
- Hybrid (family + leadership team)
- External sale as contingency (not primary)

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Legal & Structural Considerations

Structure Protects Relationships

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Financial Planning & Business Valuation

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If the Math Doesn't Work, The Plan Won't Either



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