

## Valuing a Financial Advisor's Practice *Equity and Purchase Value Considerations*

There comes a time in every financial advisor's life that a decision needs to be made regarding the future of their practice – whether to retire, take on an equity partner or transition out of the business to focus on other endeavors. Many advisors spend their time focusing on how they will grow their business and retain their clients and assets. Unfortunately, the vast majority of advisors have not focused on how they can maximize the true value of their practice through equity and succession planning – an oversight which could result in a loss of future practice value. Valuation and succession planning for a financial practice not only focuses on preparing for the eventual retirement or premature death or disability of an advisor, but also on maximizing what the practice can be worth to you, a potential partner or successor. This highly informative keynote presentation helps advisors understand the key factors and considerations that affect the equity and purchase value of a financial practice. By thinking through these matters early, you have the best chance of realizing the value of your lifetime of hard work.

### *You Will Learn the Key Factors in Practice Valuation:*

- *The impact of your business model, compensation and services in practice valuation*
- *How your practice management and operations can affect the value of your practice*
- *How much a financial practice could be worth with proper planning*
- *How a financial practice is valued vs. other business models*

Suggested Presentation Time: 60 to 90 minutes

