

YOU'RE AN ADVISOR— DO YOU REALLY NEED A PLAN?

Succession

If something happened to you tomorrow, what would happen to your business and how would that affect your family?

What would be the impact to your associates, employees, and clients?

If your practice were sold to an internal party, would they pay the full value?

How much of a difference would it be from the going rate in today's market?

Or would an external buyer be willing to pay much more?

Catastrophic

With no plan in place, how much control would you have over that transition in the event of a catastrophic event?

Who would take care of your clients and the multigenerational families you've guided through all their financial matters?

Continuity

Would they be divided up among rookie advisors with little or no experience?

Do you have a continuity plan for your clients, and don't they deserve one?
