



CONTINUITY MANAGEMENT



Protect Your Most Valuable Asset: Your Business

Your business has intrinsic value, separate from and in addition to your monthly compensation. And today, your financial services practice is likely one of your largest and most valuable personal assets. Take the necessary steps today to protect your practice tomorrow. With one agreement, you can ensure that this valuable asset is protected, your family receives fair value, and your clients and employees have continuity in their lives.

Do You Have a Formal, Written Plan?

FP Transitions' Continuity Management Program (CMP) is designed to help independent financial service business owners establish an industry specific plan, detailing what to do in the event of death or disability. This turnkey program includes:

- A Comprehensive Valuation of your business
- Expert consulting time
- A customized continuity agreement specific to your situation

After more than a decade of experience working with financial advisors, FP Transitions offers you the expertise to put together a compliant continuity plan, to ensure your legacy is protected.

The Most Experienced Team in the Industry

Your business needs a contingency plan that will effectively and efficiently protect your clients and your equity in the event you are not there tomorrow. This requires experience, field-tested contracts, and knowledge of the unique regulatory environment governed by the SEC/FINRA. Over the last decade, FP Transitions has helped thousands of advisors develop and establish industry appropriate continuity plans.



FP TRANSITIONS®

4900 Meadows, Suite 300 • Lake Oswego, OR 97035
Tel. 800-934-3303 • Fax 503-452-4205
www.fptransitions.com