



EQUITY MANAGEMENT SYSTEM



The Tools You Need to Grow

Managing the equity in your financial services practice is an ongoing process. Your business, your staff, and your personal goals change over time. You need a system that evolves along with your life. The Equity Management System (EMS) is a collection of tools and services offered exclusively by FP Transitions to help you determine, optimize, manage and grow the equity value of your business.

VALUATION

Using the industry's largest database of financial services businesses, FP Transitions is able to determine the true fair market value of your practice by evaluating a variety of factors. You get a clear picture of your current position in the context of this unique industry.

BENCHMARKING

A clear picture of your own business naturally leads to knowing where you stand in comparison to your peers and larger financial advisory firms. The EquityBuilder Benchmarking Report gives you a comprehensive look at how your business is performing in comparison to others in the industry. This analysis gives you a starting point for where you can adjust and improve in order to grow and maximize your potential value.

CONTINUITY

The single, biggest threat to a financial advisory practice is the lack of a formal continuity plan to protect its clients, cash flow, and value in the event of the sudden death or disability of the primary advisor. There are many levels of protection when it comes to continuity planning. From simple handshake agreements to written, binding plans that outline every detail in the event of an unexpected exit. FP Transitions' experts help you figure out which agreement is best for your practice, and assist you in putting it all together.

These three pieces are vital for whatever your business goals might be: growth, acquisition, sale, succession. They build the foundation for your success. **All three—Comprehensive Valuation, EquityBuilder Benchmarking, and Continuity Planning—are included in your EMS subscription (\$1,140 yearly, billed at \$95/month)**, in addition to support and discounts for whatever it takes to take your business to the next level.

Visit fptransitions.com/ems_membership for more information and to sign up.



FP TRANSITIONS®

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