LEADING THE WAY TO
FINANCIAL FREEDOM

ADVISOR SUCCESSION

Advisor Succession

You're not alone. Believe it or not, many financial advisors don't have a succession plan. They've spent decades taking care of their clients' and helping them transition into their third act in retirement, but haven't yet taken the time to craft one for themselves. Usually it isn't by design or because the thought hasn't crossed their mind. It's typically because financial advisors are no different than any other business owner. You don't want to give up control, you don't want to walk away from the client relationships you've developed over the past several decades, you enjoy keeping up with financial markets and you like the income. Let's face it, you can only play so much golf and your spouse isn't sure they can tolerate you 10 more hours a day! Our team at Alpha Financial Partners not only recognizes the challenges an advisor, of any age, has when trying to transition, but we look to fairly monetize your book of business so it's a win-win for all parties: yourself, your family and equally importantly your clients. Having one of only 1,500 nationally Certified Exit Planning Advisors (CEPA) on staff makes Alpha uniquely qualified to guide you through this transition in a way that is clear, concise, flexible and mutually rewarding for all involved. Whether you are fee based, commission based, or some combination thereof, if you are even remotely considering retirement in the next few years, you owe it to yourself to have a conversation with us. You will not find a local team of more honest, passionate or capable professionals to entrust your clients with. Contact us today for a confidential conversation and see for yourself the Alpha difference.

Highlights

- Up front and structured payments for books of business
- Flexible terms
- Mutual beneficial pricing
- Experience and process that you and your clients can count on
- Team approach
- Multi-Custodian/ Hybrid RIA model
- True independence

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