



Scale Up, with Synergy



In the first few years of establishing your advisory business, your focus was on getting the business up and running and building trusted relationships with your clients and their families.

As your business has matured, you recognize the need to do more—broaden your firm’s areas of interest, tap new markets, or expand the services you offer. We’ll show you how.

You may be working with increasingly affluent clients that require more sophisticated advice and solutions to manage their wealth. Either way, you have reached an inflection point in the life of your RIA firm where you recognize that to continue to grow your practice while providing the service your clients deserve, it might make sense to merge with another firm.

Joining an established firm can provide you with a few advantages, allowing you to create additional scale; realize a potential succession solution if you’re a solo practitioner; benefit from “best of breed” practices across both entities to support growth; and access the operational, technology, marketing, and human resources support you need to stay competitive.

When done right, a transition can be transformative—for your business and your clients. As you consider taking this step, compatibility is key, as is experience. A smooth transition requires a robust implementation plan that details the integration of personnel, client relationship servicing and operations, without missing a beat. You want to select a partner that shares your vision, is fundamentally aligned with your goals and values and—most importantly—is experienced in how to successfully transition a firm.

YOUR STRATEGIC PARTNER

This is where Synergy Capital Solutions can help. We have a transition framework in place to help bring you and your team onboard. We can guide you through a process that makes sense for everyone—respecting and embracing your clients, your team, and the culture of your firm.

Our experienced team is knowledgeable in the areas necessary for your transition to be successful, including RIA business valuation, practice management, operations, technology and human resources. Our distinctive deal structures take into account your target objectives—whether you are simply seeking a better home for yourself and your clients, or looking to align with a growth-focused firm that can take your firm to the next level.

We respect the business that you've built and the relationships you have created with the individuals, families, and business owners you serve, and are here to help you plan the next chapter of the life of your business.

LET'S TALK

Give us a call at (888) 363-4546 to learn more about what it means to join Synergy Capital Solutions.



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