



## Your Firm, Your Legacy



You've built a successful business and established lasting relationships with longtime clients and their families, helping them build a strong financial foundation that has served them well through different stages of their lives. Now it's time to focus on your next chapter.

Like your clients who are nearing retirement age, you are also beginning to recognize you have some goals outside of work that require more of your focus and attention—spending more time with loved ones, volunteering, traveling—or new passions that you'd like to pursue. As you look ahead to the next few years, you're wondering what will happen to your business, your clients, and beginning to consider whether it might be a good time to get serious about succession planning.

If you haven't taken the time to put a succession plan in place, you're not alone. According to a 2018 Financial Planning Association report, only 27% of advisors say they have any kind of plan in place. And only 11% of advisors have clear retirement plans in place for themselves.<sup>1</sup>

There are many obstacles to taking the first step toward planning for the future of your business. Similar to the challenges your business owner clients face when exit planning, you may be asking yourself questions that feel insurmountable. What is my business worth? Who is the right successor for my business? How would leaving my business impact my sense of identity? And what are the mechanics of creating a plan that won't be disruptive to my clients and staff?

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<sup>1</sup> <http://www.fpafla.com/wp-content/uploads/2018/07/FPA-Succession-Planning-Report-0418FINAL.pdf>

## YOUR STRATEGIC PARTNER

This is where Synergy Capital Solutions can help. We have a succession framework in place to help you plan forward. We can guide you through a transition 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, operations, technology and human resources. Our distinctive deal structures take into account your target objectives and where you are in the succession process—whether you're interested in a short-term business exit, or looking for a good home for your clients and yourself over the next several years, to allow for a long and orderly transition.

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.

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## 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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