



The Intentional Succession Prep

Planning and carefully executing an exit strategy is integral to the future of your firm and the success of your own retirement plan. A succession plan communicates transparency and fosters the continuing loyalty of your clients by ensuring they'll be taken care of when you choose to move on.

Why Take the Time to Create Your Succession Game Plan?



Optimize the Value
Your Business



Make Sure Your Clients
Are Taken Care Of



Ensure Employees
Are Taken Care Of



Confirm Your Legacy
and Culture Live On

A Shoemaker With No Shoes?

It's tough to take your own advice. Just as you encourage your clients to plan for the future of their business, you need a succession plan for your own wealth management firm. No matter what stage of your career you find yourself in, it's time to start actively taking steps towards implementing a succession plan. You're not alone; our team is ready to help you understand all the options available to you from finding new leadership to enhancing the value of your firm in today's market.

A LENS INTO YOUR PARTNERSHIP WITH BLUESPRING WEALTH

1. Maximize the value of your practice – you've worked hard to build the business and deserve full value at the sale
2. Flexibility in deal structure – whether full or partial acquisition
3. Entrepreneurial focus – so the legacy you created lives on
4. Ensuring that your clients and employees are well taken care of – and feel good about our new partnership
5. Capital and Industry expertise – to facilitate growth through sub-acquisitions and creative marketing strategies



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