



**BLUESPRING**  
WEALTH PARTNERS

# Why the Succession Deficit in Wealth Management?

There's never been a better time to sell a wealth management firm, but it's a difficult time to afford buying one. It's nearly impossible for a younger person to absorb the debt required to buy out a firm. Is next generation willing to put their family's financial security and personal cash flow needs at risk, leaving us with a succession gap? **The answer? Intrapreneurialism**

## What Is an Intrapreneur?

### INTRAPRENEUR

- ✓ Has the latitude to run a firm without taking on personal debt
- ✓ Makes critical decisions without risking personal capital
- ✓ Treats business as if it's their own—without the downside risk
- ✓ Share in upside financial success of the business



### ENTREPRENEUR

- ✓ Personally responsible for the businesses' success
- ✓ Handles all decisions and financial liability
- ✓ Risks personal savings, time and energy
- ✓ Experiences the upside and downside of the businesses' finances

**It's possible to reap entrepreneur type benefits, without risking personal finances, with the intrapreneurial model.**

**UP-AND-COMING  
WEALTH MANAGERS**



**What's your personal growth strategy?**

**Does your career path include  
creative opportunities?**

**ESTABLISHED  
WEALTH MANAGERS**



**How can you help the next generation step  
into leadership without taking on risk?**

**Do you have a transition plan?**

Visit [WWW.BLUESPRINGWEALTH.COM](http://WWW.BLUESPRINGWEALTH.COM) to learn more about intrapreneur benefits.