

# Acquisition Secrets

*For Today's Marketplace*



## Course Curriculum:

### November

Preparing Yourself for Rapid Growth

### December

Strategies for Finding Sellers

### January

Understanding Practice Value and Valuation Techniques

### February

Making a Successful Offer: The Term Sheet/Letter of Intent

### March

Negotiation Strategies of Successful Buyers

### April

Advanced Financing Strategies; Collateral and Security Issues

# 12 Months to Become a Better Buyer

The fastest way to grow your business is through an acquisition, and with more than half of this industry now over age 50, the opportunity is at hand. FP Transitions has worked with thousands of successful buyers over the past decade and has distilled the secrets of acquisition success into a detailed course curriculum designed to help advisors master the intricacies of buying a financial services practice.

This series of 12 classes complete with articles, white papers and guest speakers, as well as a special benefit package upon completion, provides buyers with detailed instruction focused on four key areas:

1. **Acquisition Strategies** – Where to find sellers and how to determine fair market value
2. **Deal Mechanics** – How to structure the deal and control risk
3. **Tax Strategies** – Learn how to write off the entire purchase price
4. **Closing the Deal** – How to retain clients and assets for the long term



FPTRANSITIONS®

[www.FPTransitions.com](http://www.FPTransitions.com)

10260 SW Greenburg Rd., Suite 1170 • Portland, Oregon 97223 • Tel 800.934.3303 • Fax 503.452.4205

# Now is the time to move your practice to the next level

This unique series of 12 fast-paced, 60-minute live sessions (Instruction + Q&A) will provide participants with access to cutting edge, unbiased tools and strategies from the experts in the field of financial advisory M&A activity.

Participants will receive an increased Buyer Rating of 4 points upon completion of the webinar series, plus advance notification of new seller listings, and a “Certified Buyer” designation. These benefits are instrumental in helping you stand out from the crowd when inquiring to sellers. If you are serious about acquiring a financial services practice, the material in this series is essential to your success. Now is the time to move your practice to the next level.

For just \$25 per month, participants will receive the complete 12-month series.

**Join any time!**

To sign up, please [click here](#)  
or call us at 800.934.3303.



## Course Curriculum Continued:

### May

Tax Allocation Strategies

### June

Negotiation Skills of Successful Buyers

### July

Performing Due Diligence

### August

The Documentation Process

### September

Closing the Deal; Compliance Issues

### October

Post-Closing: Transitioning Clients

