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®

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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 $275, participants will recieve the complete ASC series.

Join any time!

call us at 800.934.3303

FPTRANSITIONS®
The Succession Company

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