

EQUITY MANAGEMENT SYSTEM[®]



Managing the equity in your financial services practice is an ongoing process. Your business, your staff, and your personal goals change over time. To help manage, protect, and improve your practice according to your unique goals, the Equity Management System[®] (EMS) offers two levels of resources to support your individual business.

Each EMS path includes two core benefits, a Comprehensive Valuation Report and a Continuity Plan to monitor and protect your practice. Whether you want to manage value or actively grow your business, you can select a membership that fits your needs.

EMS BASIC

Track and protect your value with member-driven resources and coaching when you need it.



- » Annual Comprehensive Valuation Report
- » Annual Continuity Plan with Updates
- » Priority Access to Listings + unlimited inquiries
- » Member Exclusive Resource Library Access

\$95/mo.
annual agreement, billed monthly

EMS GROW

Track your value, protect it, and get to work on making it grow.



- » Annual Comprehensive Valuation Report
- » Continuity Plans with Updates
- » EquityBuilder[®] Benchmarking Report
- » Additional Annual Valuation for Acquisition
- » Personalized Coaching
- » Discounts on Additional Consulting
- » Priority Access to Listings + unlimited inquiries
- » Member Exclusive Resource Library Access
- » Expert Industry Studies

\$195/mo.
annual agreement, billed monthly

Visit fptransitions.com/ems_membership for more information and to sign up.



FP TRANSITIONS[®]

4900 Meadows, Suite 300 • Lake Oswego, OR 97035
Tel. 800-934-3303 • Fax 503-452-4205
www.fptransitions.com