



# EQUITY MANAGEMENT SOLUTIONS™

## EMS MEMBER SERVICES

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 Solutions™ (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.



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COMPREHENSIVE  
VALUATION

CONTINUITY  
PLAN

- » 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.



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COMPREHENSIVE  
VALUATION

CONTINUITY  
PLAN

BENCHMARKING  
REPORT

- » Annual Comprehensive Valuation Report for your practice
- » Additional annual valuation for acquisition
- » Continuity plans with updates
- » EquityBuilder® Benchmarking Report
- » Personalized Coaching
- » Discounts on additional consulting
- » Priority access to listings + unlimited inquiries
- » Member-exclusive resource library access
- » FP Transitions industry studies

**\$295/mo.**

Annual agreement, billed monthly

Visit [fptransitions.com/ems\\_membership](https://fptransitions.com/ems_membership) for more information and to sign up.



FP TRANSITIONS®

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