



# ENTERPRISE CONSULTING

## END-TO-END SOLUTIONS

### Leadership That Understands Your Business

Thriving, growing businesses face many challenges, and solving them requires cutting-edge solutions. Whether your goals include mergers, acquisitions, recruiting, or succession planning, you need to optimize your practice to simultaneously power top-line growth and bottom-line profitability. FP Transitions' Enterprise Consulting will help you take your business to the next level.

Enterprise Consulting is designed to adapt to your needs, your time frame, and your budget to provide effective and cost-efficient solutions. As an advisor, you know the importance of offering tailored and informed advice to each client who walks through your door, and we do, too.

Together we'll explore your immediate objectives, your growth targets, and your long-term goals. We'll identify the challenges and opportunities in front of you, and develop an end-to-end plan complete with a timeline and an accurate cost projection to reach your specific objectives. We listen first in order to offer an informed solution, then we plot the course forward—together.

**THE CHALLENGES & OPPORTUNITIES ADVISORS FACE TODAY** GENERALLY FALL WITHIN FOUR MAJOR CATEGORIES:



### TRANSFORM YOUR BUSINESS WITH THESE INTEGRATED SERVICES:



#### RECRUITMENT

- Compensation Structuring
- Cash Flow Modeling
- Talent Retention



#### ACQUISITIONS

- Open-Market & Private Listings
- Financing Strategies
- Mergers



#### TRANSACTION SUPPORT

- Non-Advocacy Support
- Deal Structuring Techniques
- Industry-Specific Contracts
- Tax Allocations



#### SUCCESSION PLANNING

- Continuity Planning
- Ownership Transfer
- Exit Planning
- Compensation Strategies



#### ENTERPRISE DESIGN

- Entity Structuring
- Membership Reorganization
- Platform Analysis
- Corporate Governance



#### VALUATION SERVICES

- Market-Based Valuation
- Certified Business Appraisal
- Litigation Support
- Appraisal Review





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## HOW THE PROGRAM WORKS AND HOW TO GET STARTED TODAY



### 1. Strategic Assessment

We begin with a thorough analysis of your practice to determine what you've built and how you've built it. We identify its strengths and weaknesses, then work with you to create a customized plan of action. Together, we create a clear vision of where you've been in order to get your business where it needs to be. At the end of this stage, you are provided with a detailed roadmap of next steps, ready for you to implement.

### 2. Transform Your Business

Next, we bring together an integrated and focused team of lawyers, analysts, appraisers, and strategy consultants—all under one roof—to ensure you have the necessary resources and the right tools in place as we execute your plan.

### 3. Maintain Your Enterprise

As your business evolves, a dedicated and experienced plan manager will help guide your team and make any necessary adjustments to your plan over time.

Visit [fptransitions.com/enterpriseconsulting](https://fptransitions.com/enterpriseconsulting) for more information and to schedule a consultation.

