

# 6 REASONS

## Why Now Is the Best Time to Sell Your Advisory Practice

1



### High Valuations

The industry is seeing all-time high valuations, driven by new financing options, increased demand, and industry aggregators. Selling today allows practice owners to capitalize on the current M&A market at presumably all time low tax rates, and either retire or remain involved part-time.

2



### Competitive Terms

With the infusion of bank capital a few years ago, we are able to help clients obtain 70%-100% cash paid at closing, and in many cases, with no clawback or contingencies. Selling today allows owners to take advantage of the current financing options and buyer's desire to achieve scale as a means to extract full value and minimize their risk.

3



### Consolidation Trends

The industry is undergoing significant consolidation given the aging advisor demographic. This trend is driven by the lack of proactive succession planning, firms seeking scale, increased regulation, and a variety of other factors. Selling now allows practice owners to capitalize on this demand and find the best fit for their clients while also getting maximum value.

4



### Aging Advisor Demographics

A significant portion of financial advisors are nearing retirement age, creating a natural supply of sellers and a demand for succession solutions. This demographic shift means there are many buyers actively seeking to acquire established books of business to ensure continuity and growth.

5



### Technological Advancements

The increased use of technology in practices allows firms to deliver greater "value" to their clients at less cost, making a practice more attractive to potential buyers, and allows buyers to serve a more diverse clientele. Selling now enables practice owners to also take advantage of these factors to maximize value and demand.

6



### Regulatory Environment

The regulatory landscape for financial advisors is becoming increasingly complex and burdensome. Many smaller practices struggle to keep up with compliance requirements, making selling to a larger, well-resourced firm an attractive option. This transfer of regulatory responsibility can be a significant relief for sellers.

Contact us today for more information

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503-427-9910

