

Dealer to Dealer Transition

Monetize – a fantastic way to put money in your jeans is to change Dealers. A lot of work re-papering clients but also a way to improve your business.

Change business model – a great start to changing your business model to a Referral, Relationship, Specialized, Family Office, etc. is to move to a platform with a better fit.

Clean up and consolidate – the cleanest books I've seen are those that have moved once or twice. Get rid of small accounts, clients with the wrong demographics, etc. Often trimming unwanted client increases value.

Partnership / Merge – excellent way to find the best partner. This can result in setting up a Succession / Exit Strategy / Continuity Plan which are all great strategies.

Technology / Support / Better fit -

Increase selling price

More sellers and buyers

Jump start your business

Best for clients

PROCESS

Anonymity is assured.

+

Value your business

+

Term Sheet

+

Customize a Marketing Plan to create the most interest.

+

Negotiate the best price and the best terms with the best candidate

+

Due Diligence of candidate

+

Guide you through the whole process to help reduce anxiety and apprehension.