

Sell & Stay / Merge / Partner

Many advisors are not ready to exit and ride off into the sunset. At the same time, they worry about having a Succession Plan in place and a Continuity Plan in case of sudden death, disability or being unable to run their business.

Our process is similar to an out right sale but requires additional negotiations and usually takes longer.

Confidentiality is a key so you do not have every advisor you ever met calling you. You are anonymous until you agree to be introduced to a candidate.

A term sheet is the first step. An overview of your business, what you are looking for and who is the perfect candidate. Outlining the expectations sets the negotiating rules.

We prepare a marketing plan which targets what you are looking for and we reach out to those advisors. Queenston identifies the interested parties and then conducts an interview to determine if they are also a qualified candidate.

Guaranteed exit price when you are ready to go. Negotiate now and know what you will get when ready to exit.

Continuity Plan in place. Know what happens to your business if something happens to you. Price and terms in place BEFORE anything happens. Hope it is not triggered.

Queenston spends 100s of hours when we work on these opportunities. We take our client thru the process to maximize anonymous exposure to find the best candidates. The difference between the advisor down the hall or dealing with Queenston could be hundreds of thousands less dollars and not find the best candidate.

PROCESS

Anonymity is assured.

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Value your business

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Term Sheet

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Customize a Marketing Plan to create the most interest.

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

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Due Diligence of candidate

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