



## Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance)

*David Grau*

Download now

[Click here](#) if your download doesn't start automatically

# Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance)

David Grau

**Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance)** David Grau

**This book is going to challenge you and everything you think you know about succession planning.**

For independent advisors, succession planning is quickly becoming the cornerstone to a strategic growth strategy designed to perpetuate their business and their income streams beyond their own lifetime, while providing a multi-generational service platform that attracts and rewards younger advisors. This makes succession planning one of the most, if not *the* most, important practice management tools in this industry today.

As an independent financial advisor, now is the time to address the question of what will happen to your practice and your clients after you “exit the building.” In most cases, the answers are right in front of you. Thankfully, *Succession Planning for Financial Advisors: Building an Enduring Business* has arrived to transform today’s practices into businesses designed to endure and prosper and serve generations of clients.

- Learn how to create a “Lifestyle Succession Plan” that can provide a lifetime of income and benefits to the founder even as he/she gradually retires on the job
- Unlock the power of equity management – the best planning and building tool an independent advisor owns
- Learn how to attract and retain the best of the next generation to help you build a great business and to support your succession plans and care for your clients and their families
- Determine precisely when to start a formal succession plan and related continuity plan so that your business can work for you when you need it most
- Understand why succession planning and selling your business are completely different strategies, but how they can complement each other when used correctly

95% of independent financial service professionals are one owner practices. To the positive, these practices are among the most valuable professional service models in America. But almost all advisors are assembling their practices using the wrong tools – tools borrowed from historically successful, but vastly different models including wirehouses, broker-dealers, and even OSJ’s and branch managers. Revenue sharing, commission splitting and other eat-what-you-kill compensation methods dominate the independent sector and virtually ensure that today’s independent practices, if left unchanged, will not survive the end of their founder’s career. It is time to change course and this book provides the map and the details to help you do just that.

For independent practice owners and staff members, advisors who want to transition to independence, as well as accountants, attorneys, coaches and others involved in the financial services space, there are invaluable lessons to be learned from *Succession Planning for Financial Advisors*. Written by the leading succession planning expert in the financial services industry, former securities regulator, M&A specialist, and founder of the nationally recognized consulting and equity management firm, FP Transitions, David Grau Sr., JD, has created an unmatched resource that will have an enduring and resounding impact on an entire industry.

 [\*\*Download\*\* Succession Planning for Financial Advisors: Buildi ...pdf](#)

 [\*\*Read Online\*\* Succession Planning for Financial Advisors: Buil ...pdf](#)

## **Download and Read Free Online Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) David Grau**

---

### **From reader reviews:**

#### **James Gabriel:**

Nowadays reading books are more than want or need but also get a life style. This reading practice give you lot of advantages. Associate programs you got of course the knowledge the particular information inside the book that improve your knowledge and information. The information you get based on what kind of e-book you read, if you want have more knowledge just go with schooling books but if you want truly feel happy read one together with theme for entertaining such as comic or novel. The actual Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) is kind of e-book which is giving the reader capricious experience.

#### **Jennifer Oaks:**

Reading a reserve tends to be new life style in this era globalization. With examining you can get a lot of information that can give you benefit in your life. Together with book everyone in this world could share their idea. Ebooks can also inspire a lot of people. Lots of author can inspire their reader with their story or even their experience. Not only situation that share in the publications. But also they write about the information about something that you need illustration. How to get the good score toefl, or how to teach your young ones, there are many kinds of book that you can get now. The authors on this planet always try to improve their talent in writing, they also doing some analysis before they write to their book. One of them is this Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance).

#### **Edward Schanz:**

Would you one of the book lovers? If so, do you ever feeling doubt while you are in the book store? Make an effort to pick one book that you find out the inside because don't determine book by its handle may doesn't work the following is difficult job because you are frightened that the inside maybe not while fantastic as in the outside appearance likes. Maybe you answer is usually Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) why because the excellent cover that make you consider with regards to the content will not disappoint you. The inside or content is fantastic as the outside or maybe cover. Your reading sixth sense will directly guide you to pick up this book.

#### **Frances Wiggins:**

Don't be worry if you are afraid that this book may filled the space in your house, you might have it in e-book method, more simple and reachable. This kind of Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) can give you a lot of pals because by you looking at this one book you have matter that they don't and make anyone more like an interesting person. This specific book can be one of a step for you to get success. This reserve offer you information that maybe your friend doesn't realize, by knowing more than various other make you to be great individuals. So , why hesitate? We need to have Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance).

**Download and Read Online Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) David Grau #VSYIU2LG5RJ**

# **Read Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau for online ebook**

Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau  
Free PDF d0wnl0ad, audio books, books to read, good books to read, cheap books, good books, online books, books online, book reviews epub, read books online, books to read online, online library, greatbooks to read, PDF best books to read, top books to read Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau books to read online.

## **Online Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau ebook PDF download**

**Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau Doc**

**Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau MobiPocket**

**Succession Planning for Financial Advisors: Building an Enduring Business (Wiley Finance) by David Grau EPub**