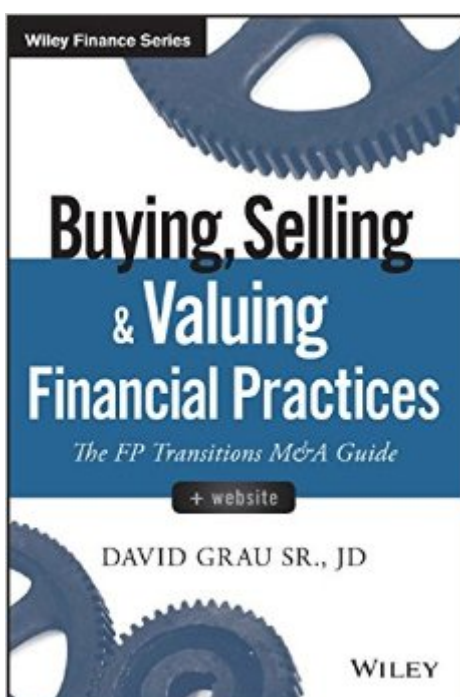


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Buying, Selling, And Valuing Financial Practices, + Website: The FP Transitions M&A Guide (Wiley Finance)



Synopsis

The Authoritative M&A Guide for Financial Advisors Buying, Selling, & Valuing Financial Practices shows you how to complete a sale or acquisition of a financial advisory practice and have both the buyer and seller walk away with the best possible terms. From the first pages of this unique book, buyers and sellers and merger partners will find detailed information that separately addresses each of their needs, issues and concerns. From bestselling author and industry influencer David Grau Sr. JD, this masterful guide takes you from the important basics of valuation to the finer points of deal structuring, due diligence, and legal matters, with a depth of coverage and strategic guidance that puts you in another league when you enter the M&A space. Complete with valuable tools, worksheets, and checklists on a companion website, no other resource enables you to: Master the concepts of value and valuation and take this issue off the table • early in the negotiation process Utilize advanced deal structuring techniques including seller and bank financing strategies Understand how to acquire a book, practice or business based on how it was built, and what it is capable of delivering in the years to come Navigate the complexities of this highly-regulated profession to achieve consistently great results whether buying, selling, or merging Buying, Selling, & Valuing Financial Practices will ensure that you manage your M&A transaction properly and professionally, aided with the most powerful set of tools available anywhere in the industry, all designed to create a transaction where everyone winsâ” buyer, seller, and clients.

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Customer Reviews

Sometimes books are perfectly targeted for exactly the stage you are in your life or business. If you are even contemplating buying or selling an advisory practice, this book is just a Godsend. The state of our financial advisory industry is such that if you really want to become informed on the topic of how to buy or sell a practice/business, you really have two choices - Tibergien's/Dahl's book (which is also excellent, and still relevant after 10 years) and Grau's book. These are the bibles (and this one is absolutely current and reflective of exactly what's happening now in terms of valuations, deal structures, financing alternatives, etc. For example, 10 years ago, almost all deals were seller financed. Today, with the emergence of Live Oak Bank and similar cash-flow based lenders, the landscape has really changed and this book reflect that.) Beyond these two books, you really have to wander in the educational wilderness piecing together bits from here and there to become informed. There just aren't ANY other resources (I know of) which offer you an A-Z education in how to approach a deal wisely. This book does a great job of it. Of note is that it really starts with the premise that its job is to help you get the deal done. It's not about teaching you how to vanquish your opponent. In most cases, you'll end up in an economic marriage with your deal partner and this book recognizes that and helps you approach thinking about it all in a reasonable, collaborative way. The book offers a great amount of help with valuations, deal structure, financing, due diligence, tax issues, legal issues, and planning for a successful transition and client retention. I has helpful checklists and sample document templates.

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