



FP TRANSITIONS®

Partnership between FMG and FP Transitions ignites 360-degree growth solutions for independent advisor businesses

Firms team up to power comprehensive advisor growth by combining the consulting expertise of FP Transitions with the easy-to-use, proven marketing technology and content platform of FMG.

Lake Oswego, OR, Dec 15, 2022 (GLOBE NEWSWIRE) – FP Transitions, the industry’s leading growth consultancy for wealth management firms including succession planning, equity management and M&A services, announced a partnership with FMG, the premier advisor marketing automation, content and website platform for independent financial advisors. Guiding wealth management firms through often complex and pivotal transformations, FP Transitions’ partnership with FMG sparks a competitive advantage for advisors seeking to build powerful, sustainable enterprises.

Leveraging two decades-worth of actionable data points around growing and valuing a business, FP Transitions’ delivers strategic insights that enable firm durability, growth, and relevancy. “Simply put, inorganic growth works incredibly well when paired with strong organic growth levers,” shared Marcus Hagood, Director of Equity Management Solutions® at FP Transitions. “With our data insights and analytics, we can tell advisors that the median client-to-licensed professional ratio is 85:1, or that multi-partner firms should adopt a one-third professional compensation, overhead, and profit model. We also know that, for example, \$200 million AUM firms who are growing revenue at two times the rate of their industry peers are spending an average of 33% more on marketing each year. Our partnership with FMG allows us to provide stronger guidance on how to invest in marketing.”

Partnering with FMG, the highest-rated and most-utilized marketing platform for advisors, provides FP Transitions' consulting clients with an easy way to implement strategic recommendations. Advisors will be able to execute across key marketing objectives such as building their brand, increasing referrals and attracting new prospects. Recent studies by McKinsey and FA Magazine showed the frequency of client communications is directly correlated with client satisfaction, a statistic healthy advisory firms should be considering as they build out growth strategies. FMG has spent the past decade arming advisors with tools and resources that sustain a robust client and prospect communication strategy.

FP Transitions' clients will receive exclusive pricing on FMG marketing and website service packages through a private client microsite. The FMG and FP Transitions partnership gives advisors a comprehensive and powerful solution designed to maximize the value of their business.

"Our partnership with FP Transitions is a perfect combination of firms whose mission is to help advisors grow and ultimately increase the value of their most important asset - their business," stated Susan Theder, Chief Marketing and Experience Officer of FMG. "FP Transitions is the industry leader in helping advisors assess their business and identify opportunities to drive additional enterprise value. FMG complements this by helping advisors execute marketing solutions that support firm growth. We weave our thought leadership into the content strategy and conversion tools to help advisors execute a multi-channel marketing plan in a simple, yet scalable way."

"These are key areas of opportunity for firms right now, especially those coming out of an M&A experience, or even just those focused on growing their firm," explained Brad Bueermann, Principal and CEO of FP Transitions. "Clients are going to expect an elevated level of service, more than advisors have had to provide over the last few years. How firms navigate this expectation will dictate their value."

Advisors interested in turning on their growth engine should join FP Transitions and FMG for a webinar on Tuesday, January 17 at 1pm ET/10am PT. [Register here.](#)

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