# Propelled by recent growth, FP Transitions hits a valuation milestone and invests in its own expertise.

FP Transitions marks wins and gears to deliver the industry's greatest transformational growth insights.

Lake Oswego, OR, Mar 12, 2023 (GLOBE NEWSWIRE) -- Executing on its decades-long commitment to building sustainable wealth management enterprises, independent advisory consultant and data house, FP Transitions, announced a monumental achievement of 15,000 firm valuations fueling its proprietary benchmarking platform, and a pivotal, synchronous leadership transition.

The firm also continues to see record growth in clients and has amassed talented experts to best serve their growing base. "Our momentum is clear. We've experienced growth of nearly 20% per year since 2017," shares Brad Bueermann, Principal and CEO of FP Transitions. The privately-owned firm's executive leadership team also includes Eric Leeper, CFA, Principal and former VP of Research and Analysis. Leeper was elevated to the role of Chief Financial Officer at the end of 2022, and continues to lead a team of more than 20 experts including legal, valuations and consulting departments, along with overseeing the corporate financials.

Succession planning within the firm mirrors the prescriptive advice FP Transitions provides to thousands of advisors each year. The firm continues to promote leaders within its own ranks and bring on additional equity partners. Today the firm has five principal owners, including its newest addition, James Fisher, JD, who heads up the firm's award-winning Mergers & Acquisitions team. "Given the importance of advisor mergers and acquisitions on the overall sustainability of the industry, James' exemplary leadership and ability to navigate complex deals is indispensable. Bringing him on as a principal owner was an obvious next step," shared Bueermann.

For the past 24 years, advisors have turned to FP Transitions for insights on where and how to build healthy, sustainable businesses of enduring and transferable value, with much of this insight founded on its work through objectively reliable equity valuations. Advancing this mission, the firm has welcomed-back Aaron Wells, CVA, to lead its Valuations department. Wells brings nearly a decade of experience in advisor M&A and valuations with FP Transitions and LPL's CFO Solutions team. At the broker-dealer, Wells designed compensation, exit plans, and value growth solutions for the firm's largest clients.

"Aaron has proven his ability to work alongside advisors, procure groundbreaking research and pivot the way our industry utilizes data to transform businesses," shares Leeper. FP Transitions has built a vast and unmatched dataset composed of more than one hundred comparison points for each wealth management firm. Clients range from broker-dealer to RIA and from $100 million to several billion assets under management. Through financial analysis, the team establishes benchmarks and makes recommendations on what a firm's next steps should be to accomplish their unique goals. Under Wells' purview, FP Transitions will be optimizing these datasets to spark enhanced growth opportunities for firms across the industry.

Historically, the firm has a track record of securing talent that has gone on to develop incredible skills from across the industry and then returned, applying their acquired talents to best serve FP Transitions' clients. "Our culture allows us to part ways and then welcome back our best and brightest to take on even bigger challenges as a collective team," shared Christine Sjolin, SHRM-SCP, Principal and Chief of Staff within the firm.

At its core, FP Transitions is a succession, valuation, M&A and consulting firm that enables advisors to establish, grow, transform and protect their enterprise value. Firms interested in exploring all that FP Transitions has to offer should visit https://www.fptransitions.com/.

**About FP Transitions**

FP Transitions pioneered Succession Planning for financial advisors and continues to fundamentally transform how independent wealth management businesses evolve into sustainable enterprises. Leveraging benchmarking data from 15,000+ valuations and backed by a team of more than 60 professionals, FP Transitions delivers intelligent insights that enable multi-generational firm growth. Learn more at www.FPTransitions.com.

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