



EQUITY MANAGEMENT SOLUTIONS[®]

EMS[™] MEMBER SERVICES

Managing the equity in your financial services practice is an ongoing process. Your business, your staff, and your personal goals change over time. To help manage, protect, and improve your practice according to your unique goals, the Equity Management Solutions[®] (EMS[™]) offers two levels of resources to support your individual business.

Each EMS[™] path includes two core benefits: a Comprehensive Valuation Report and a Continuity Plan to monitor and protect your practice. Whether you want to manage value or actively grow your business, you can select a membership that fits your needs.

EMS[™] ESSENTIALS

Fundamental business tracking and protection tools for practice owners who are looking to maximize the value of what they have or in preparation for a sale.



MARKET VALUE ANALYSIS



CONTINUITY PLAN

- » Market Value Analysis
- » Continuity Plan with Updates
- » Acquisition Notifications
- » Exclusive Member Tools + Resources

\$95/mo.

Annual agreement

EMS[™] PROFESSIONAL

Growth tools and coaching for forward-thinking owners looking to enhance their business through a variety of strategies, including growth and acquisition recommendations.



ASSESSMENT OF BUSINESS EQUITY



CONTINUITY PLAN



BENCHMARKING REPORT

- » Assessment of Business Equity Value
- » Comprehensive Benchmarking Report
- » Continuity Plan with Updates
- » Continuity Partner Matching
- » KPI Consulting
- » Acquisition Readiness Tools
- » Priority Acquisition Notifications
- » Market Assessment of an Acquisition Target
- » Expert Industry Studies and Data

\$500/mo.

Annual agreement

Visit fptransitions.com/ems for more information and to sign up.

