



FP TRANSITIONS®

Integrated Advisors Network (Integrated) is excited to announce a new addition to the Alliance Program. FP Transitions, a financial services M&A consulting firm out of Lake Oswego, Ore., has been selected to help advisors with valuations and continuity planning.

Integrated will leverage FP Transitions' Equity Management Solutions® (EMS™); a program which helps advisors identify their business value and draft a written, executable continuity plan for the business in the event of an unforeseen life event to the owner.

"We have a lot of firms whose owners and advisors are thinking about the continuity of their practice if something were to happen to them or beginning to put in place a succession plan," said Integrated President Michael Young. "We're responding to the question that many of them have fielded from their clients about "what happens to me if something happens to you, and concerns of that nature."

According to a recent Cerulli report, 37% of financial advisors, collectively overseeing 40% of industry assets (or about \$10.4 trillion), are expected to retire over the next decade. A quarter of those, according to the research and consulting firm, have no clear plan in place.

To help members prepare for the inevitable, Integrated selected FP Transitions to build a custom program helping its advisors prepare for unforeseen events as well as a planned retirement. While most understand the importance of creating a continuity plan, factors such as time, lack of viable successors, and confusion on how to properly structure and execute that plan have "cast a looming shadow over the future of the industry."

Advisors who take part in the program will receive an annual comprehensive valuation report, an annual continuity plan with regular updates, access to FP's vast resource library, and priority access to practices for sale for those interested in exploring acquisitions.

"Because we believe it is so vital our advisors protect their largest asset (their business), look out for any staff, and be a true fiduciary for their clients by planning for continuity of service, we have agreed to cover 50% of FP Transitions' \$95 monthly for the EMS™ Essentials membership service for as long as our advisors maintain their membership," said Young. "We're very optimistic that this is going to be something that takes off within our community and will provide a great benefit."

"As IARs, we look forward to Integrated's advisors embracing true continuity and succession planning strategies, putting client outcomes and relationships at the center of their business," said Marcus Hagoood, director of FP Transitions' EMS™ division. "Through this partnership, our organizations are not only bolstering the largest growing segment of the wealth management industry, but also empowering advisors with education, strategies and solutions that ensure clients are cared for by someone who shares their values and understands their needs."

Integrated advisors can learn more about the program at [www.FPTransitions.com/IntegratedAdvisorsNetwork](http://www.FPTransitions.com/IntegratedAdvisorsNetwork). FP Transitions will also provide free, one-on-one consultations to Integrated advisors at the company's conference in New Orleans next April.