



TIBURON STRATEGIC ADVISORS
Strategy Consultants to Financial Institutions

Financial Advisors Topical Series

Financial Advisor Business Winning Tactics & Strategies:
A Comprehensive Review of Financial Advisor Winning Tactics & Strategies

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Business Transitions Consulting.....	
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DeVoe & Company.....	
David Goad	
Echelon Partners.....	
Gladstone Associates.....	
Global Force.....	
Jay Nisberg	
Mark Elzweg	
Marsh, Berry, & Company	
Milliman USA.....	
Moss Adams	

- North Bridge Advisors
- Practice Development Institute
- Practice Sales
- Reagan Consulting
- RE Maloney Associates
- Robert Stanton
- Silver Lane Advisors
- Stark & Stark
- Tru Quest
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- Clients
- Employees
- Technology Platform
- Research, Advertise, &/or Contact Potential Buyers
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- Sub Step #2
- Advertise
- Advisor Group (iValue)
- Ameriprise Financial
- Aretec (Cetera Financial Group)
- Business Brokerage Incorporated (BBI)
- CPA Transitions
- FP Transitions
- Insurance Transitions
- LPL Financial Holdings
- NAPFA Transitions
- Professional Accounting Sales
- Raymond James Financial
- RIA Transitions
- The Charles Schwab Corporation (Schwab
Advisor Transition Support)
- Contact Potential Buyers
- Sub Step #1
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- Share Book, Offering Memorandum, or Summary
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- Share Book
- Offering Memorandum
- Summary Presentation
- Negotiate Transaction Price & Terms
- Confidentiality Agreement
- Negotiate Price & Terms
- Determining the Appropriate Purchase Methodology
- Facilitate Due Diligence
- Review Financial Statements, the Client Base, & Work
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- Examining Cultural Issues of the Firms
- Prepare for the Close
- Sub Issue #1

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