



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related FinTech) Firms

Financial Advisor Topical Series

Financial Advisor Succession Planning: A Step-by-Step Succession Planning Process

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- Financing Needs
- Valuation Experts
- Investment Bankers
- CPA Firms
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- Common Valuation Methodologies
- Book Value
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 - Percentage of Assets Under Management
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- Wirehouses, Regional Broker/Dealers, Independent Broker/Dealers, &
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