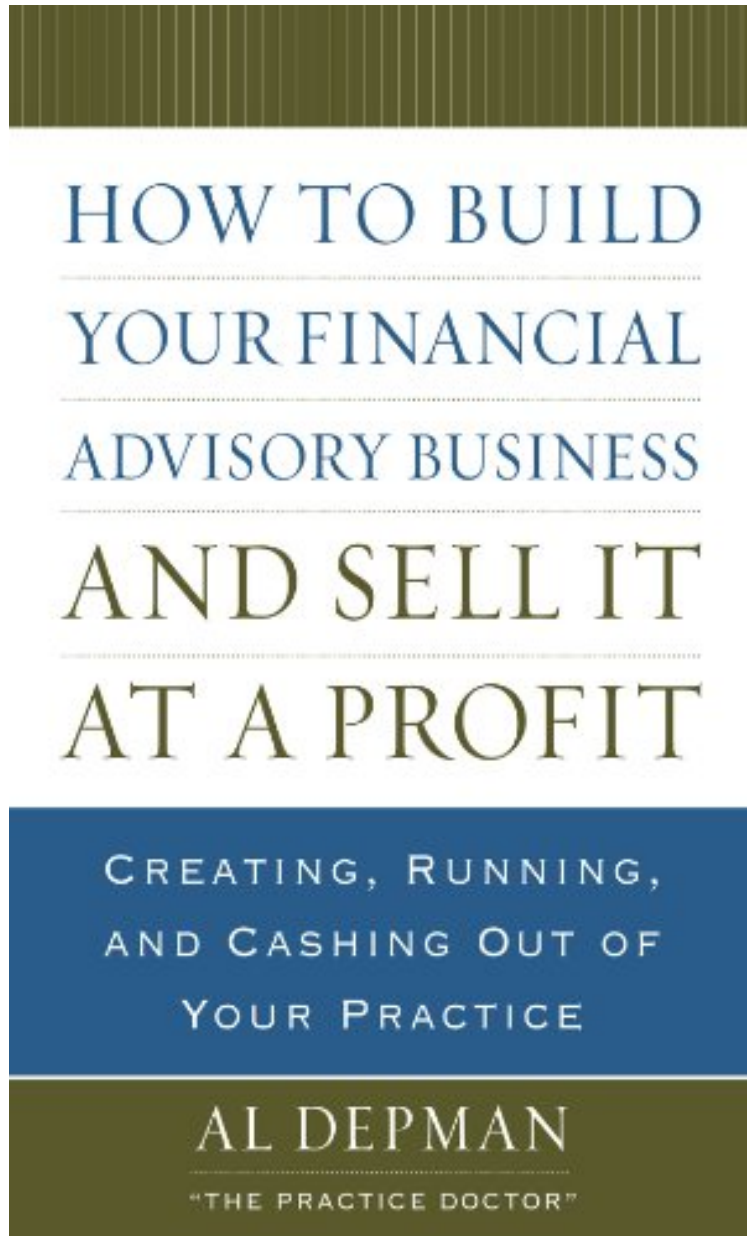


How to Build Your Financial Advisory Business and Sell It at a Profit

Al Depman

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Al Depman : How to Build Your Financial Advisory Business and Sell It at a Profit before purchasing it in order to gauge whether or not it would be worth my time, and all praised How to Build Your Financial Advisory Business and Sell It at a Profit:

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Too many financial advisors simply close shop when they decide to exitthe businessmdash;squandering untold goodwill and legacy business. Why waste a great opportunity? By applying the advice of Al Depman, a.k.a. lquo;The Practice Doctor,rdquo; you can transform your financial services practice into a legacy-focused business that will add substantial wealth to your retirement nest egg. How to Build Your Financial Advisory Business and Sell It at a Profit walks you through the steps of developing, managing, and growing a profitable practice you can sell for enhanced value or bequeath to family members. Depman guides you through the process of forming a sound plan for your financial services business, including how to: Create a team of advocates in marketing and administration Build a sophisticated referral process Develop sales and casedevelopment systems Write a best-practices operations manual Maximize new technology to streamline operations Put a succession plan in place Building a long-term business model is not just good for your future. It will also make you happier and more profitable today. Yoursquo;ll be able to spend more time with clients. Yoursquo;ll put more energy into finding new ones. Yoursquo;ll focus more on referral sources. And someone else will do the grunt work. Use How to Build Your Financial Advisory Business and Sell It at a Profit to build your business into more than a simple means to a paycheckmdash;and reap the rewards of your hard work long after you choose to leave the firm.

From the Back CoverTransform your practice from today rsquo;s paycheck into tomorrow'squo;s nest egg lquo;For years, Al Depman has proven a valuable resource for financial advisors. When applied consistently, his core principles will improve results. Get ready as Al helps you take your practice to the next level!rdquo; ?Thomas P. Burns, chief distribution officer, Allianz Life Insurance Company of North America lquo;North Star has benefited from Al'squo;s work and guidance, but the best part is that Al does all of this for the right reason?to bring out the best in all of those he works with.rdquo; ?Edward Deutschlander, CLU, CLF, Co-President, COO, North Star lquo;My work with Al Depman has taken my practice to an entirely new level. He has also inspired me to mentor others. By helping other advisors reach to the next level, it enforces my practice management and development.rdquo; ?Lisa Dale, CFP, Waddell Reed lquo;For too long, financial advisors have focused on pushing product instead of building relationships, the true measure of a practicersquo;s worth. Al Depman shows advisors how to build a practice they can be proud of. lquo;Must reading.rdquo;rdquo; ?Mitch Anthony, author of Storyselling for Financial Advisors and The New RetirementalityAbout the AuthorAl Depman , CLU, ChFC, CMFC, BH, is the owner of Practice Management Consulting. He is best known for his lquo;Practice Management Assessment Toolrdquo; and his articles that appear on Practicetools.net and MitchAnthony.com, where he is the resident business-practice consultant. Depman serves as the national Practice Management Consultant for Securian (Minnesota Life) and has also worked with advisors from Waddell Reed, AIG, LPL, State Farm, Prudential, NY Life, Metropolitan, and many independents, as well as from big brokerages, including Morgan Stanley and Merrill Lynch.