

Finding the right buyer

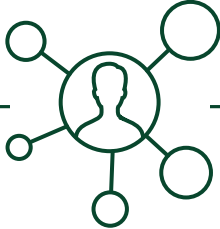
There are multiple paths to succession for independent advisors, each with a different type of buyer and outcome.

Explore the right path for your vision.



1 Hire and Train a Junior Advisor

Allows you to develop a successor over time, however they may not be ready for ownership on your timeline.



2 Sell to a Peer

Equipped with industry knowledge to take over quickly, but, may not be able to offer a competitive valuation.

3 Sell to a Strategic Buyer:

Aggregator :

Acquires and consolidates similar businesses for future resale. This offers a smooth transition – but may bring shifts in culture and investment philosophy.

Private Equity – backed Group :

Also consolidators, but they leverage private investor capital to acquire and bundle similar businesses for future resale. This allows you to monetize your book and exit, but you can expect the buyer to have a stronger focus on maximizing their financial return first over the continuity of care to clients.

Larger Firm :

Gives you name recognition and resources, but may lack dedicated succession expertise.

IPC Pinnacle

IPC Pinnacle, is a larger firm option that's built for advisors by advisors and offers choice in succession planning, aligned to your future goals. With proven framework and deep expertise, IPC Pinnacle fully funds your transition and ensures seamless execution. Clients move to seasoned successors, preserving continuity, your legacy and future.

With a
95%

post-client transition rate,
IPC lets you monetize your
business and exit on your terms.

There's a lot that goes into determining the right path for you.

Let's connect.

Succession

Your plan, on your terms.