



February 2022

Your business may be the most valuable asset you own. It embodies your life's work, the relationships you've cultivated, and the goals you've achieved. On a practical level, your business is also a significant financial resource.

Tapping the financial value of the asset you've built takes advance planning, which is easy to neglect when you're still in the fray, running a thriving business. So how do you help clients navigate life's transitions and pivots while also mapping out your own next chapter?

In this month's Digest, we're serving up insights that consider both the economic and emotional aspects of leveraging your firm's value to support your unique personal vision.



THINGS WE LIKE

Sustaining Your Practice and Reclaiming Your Life

What you've done for your clients you ought to be able to do for yourself.

No matter what you envision for your next phase – whether total freedom from former duties, a new career, or service to others – the question is: How can you leverage your own assets to support the next phase of your life? [Read the full article >](#)

RIAs Expect M&A Surge to Continue in 2022

Sixty-three percent of RIAs said they expect merger-and-acquisition activity to continue to increase this year, according to a recent survey by DeVoe & Co. The pandemic accelerated activity, the report says, focusing advisors on their goals, mortality, and lack of succession plans. [Read the full article >](#)

Are Financial Advisors Bad at Planning Their Own Exits?

Do you know who is going to take over your books when you retire? For financial advisors, it seems to be the classic “Do as I say, not as I do” problem – you’ve spent decades advising others on retirement and succession planning, but you haven’t taken the time to figure things out for yourself. [Read the full article >](#)

THE NEXT FRONTIER PODCAST



Mindy Diamond: Navigating Choice to Build Your “Best Business Life”

Increasingly sophisticated financial services technology is creating new opportunities and putting more choice into the hands of individual advisors. In this episode, we discuss how advisors can navigate these choices in a way that helps position them and their clients to thrive. [Listen to the Podcast Episode >](#)



Carolyn Armitage: Advising the Advisor

As consumer demand is increasing and financial advisors are aging, the industry is facing a succession crisis. Industry veteran Carolyn Armitage asks, “Who is there to advise advisors?” In this episode, we explore how advisors can prepare for the next chapter and better serve their clients. [Listen to the Podcast Episode >](#)



Marc Spilker and John Peluso: Perspectives on the Evolving Advice Business

Digital advancements are reshaping our expectations as clients, while also presenting new opportunities for financial advisors. In this episode, we share perspectives on key trends unfolding in the wealth management space. [Listen to the Podcast Episode>](#)

WEBCAST



Advisor M&A Review

RIA M&A activity has accelerated at a sizzling pace. This session takes a look back at 2021, shares the most noteworthy changes and trends impacting advisors' equity and business, and provides projections for 2022 and beyond. Whether you're interested in building greater enterprise value, buying or selling today (or in the future) these insights will be valuable. [View the webcast >](#)



Benchmark Your Way to a More Valuable Practice

Valuation clients often ask “How do I compare to my peers?” and “What could I do better?” This webinar covers the key value-driving metrics in a financial services practice and provides exclusive industry data for a variety of practice sizes – identifying what you are doing right, and what you should be doing to maximize the value of your business. [View the webcast >](#)



Advisors M&A Financing: How to Make it Work for You

The deal volume for selling advisor practices continues to increase, yet demand has remained strong. With down payments rising and more than 60 percent of recent deals using external lending, advisors interested in buying or selling a practice must understand how deals are getting done today. [View the webcast >](#)

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