



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

By Al Depman

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

Too many financial advisors simply close shop when they decide to exit the business, squandering untold goodwill and legacy business.

Why waste a great opportunity?

By applying the advice of Al Depman, a.k.a. “The Practice Doctor,” 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 case development 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. You’ll be able to spend more time with clients. You’ll put more energy into finding new ones. You’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 paycheck and reap the rewards of your hard work long after you choose to leave the firm.

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Editorial Review

From the Back Cover

Transform your practice from today's paycheck into tomorrow's nest egg

"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!"

?Thomas P. Burns, chief distribution officer, Allianz Life Insurance Company of North America

"North Star has benefited from Al'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."

?Edward Deutschlander, CLU, CLF, Co-President, COO, North Star

"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."

?Lisa Dale, CFP, Waddell & Reed

"For too long, financial advisors have focused on pushing product instead of building relationships, the true measure of a practice's worth. Al Depman shows advisors how to build a practice they can be proud of. 'Must reading.'"

?Mitch Anthony, author of *Storyselling for Financial Advisors* and *The New Retirementality*

About the Author

Al Depman, CLU, ChFC, CMFC, BH, is the owner of Practice Management Consulting. He is best known for his "Practice Management Assessment Tool" 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.

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From reader reviews:

Rhonda Yowell:

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