Succession planning on your terms

You've helped countless clients plan for their future. Let us help you plan yours.

Raymond James is proud to support advisors through each stage of their careers. That's why our broad range of services includes catastrophic planning, team planning, long-term successor planning, acquisition support and retirement planning.

If you've dedicated your life to building a practice you can be proud of and are now considering retirement, you can count on our Succession & Acquisitions team to help prepare you for the road ahead. We'll work with you to find the right successor for your business while helping you reap the benefits of your hard work and enjoy the next chapter on your terms.

Alternatively, if you're seeking to expand your business and acquire a new practice, you can rely on our acquisition support and long-term succession planning to help ensure a smooth and easy transition for all, including your new clients.

No matter where your career takes you, Raymond James can offer you personalized support that meets your and your clients' unique needs.

RAYMOND JAMES SUCCESSION & ACQUISITIONS

Our team prides itself on a tight-knit culture focused on meeting the needs of the advisors we serve. Through our comprehensive support, we can help you expand your practice as your goals evolve and, eventually, sell your business as you see fit. You can count on us for:

- An advisor-centric focus that prioritizes your success, whether looking to grow through acquisitions or pass the torch to the next generation
- A culture of independence that respects your right to own your book of business
- The freedom to do things your way, including choosing your successor, time frame and deal structure
- Flexible payment options to suit your needs

OUR TEAM

The Succession & Acquisition Consulting Group consists of knowledgeable consultants dedicated to helping you with every aspect of succession and acquisition. When you decide to buy or sell a practice, you'll be assigned one of our consultants to support you through the process. You can count on them to:

- Work with the seller and successor to aid in the successful transition of client relationships
- Provide assistance with the creative deal structure through consulting, practice valuation, bench marketing and cash flow modeling
- Serve as subject matter experts who communicate with all of the firm's departments that are involved in succession planning, to help facilitate a smooth hand off and a positive experience for all
- Offer guidance using our extensive knowledge of FINRA rules and regulations regarding post-retirement payment
- Assist you in creating and maintaining agreements designed to protect your practice and interests

Core services offered by Succession & Acquisition Consulting Group

Catastrophic Planning

Team Planning

Long-Term Succession Planning

Acquisition Support

Retirement Planning