

The Path to Succession Readiness

Follow Dynasty's Path to Succession Readiness to feel equipped and confident that you will succeed in the most important decision an advisor makes in his or her career.

Engaging in succession is more than just pressing a button, it's about identifying a person, a team, or a firm that is capable of continuing on an advisor's life's work and business, but also honor the same culture and legacy your firm has built today.

Four Ways Dynasty Can Help You Build a Foundation for Success and Succession.

- 1** Create dynamic and accommodative legal and organizational structure
- 2** Rethink organizational and compensation structure
- 3** Source and/or identify the right advisors to support your plan
- 4** Identify the right capital opportunities/providers if the need arises

Our Investment Banking team is dedicated to being an advisor to advisors so you can stay focused on your clients.

Email us at DIB@dynastyfp.com to receive sound succession advice and planning.

