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Sommario/riassunto	"Acquire the diverse skill set required to negotiate and execute a successful sale Buying, Selling, and Valuing Financial Practices + Website shows you how to sell what you've built, or buy what someone else has built, with a win-win outcome. Buyer and seller do not hold disparate goals; selling for maximum value and optimum tax rate—and buying for minimum risk and complete write-off—are part of the same strategy that must be the ultimate goal for the good of the industry. Unfortunately, financial advisors tend to make the same two critical mistakes. Exit planning is not succession planning, and every sale or acquisition is different. This book shows you how to complete a sale or acquisition with the best possible terms for both buyer and seller, through deliberate consideration of the size, structure, and sophistication of the opportunity. The companion website provides tools, worksheets, and checklists to aid immediate implementation, and the expert insight will prove invaluable regardless of which side of the table you're on. Buying or selling the result of a lifetime's work requires years of experience to master. This book gives you the benefit of high-level expertise in the multiple disciplines that

contribute to a successful sale or acquisition, to provide the perspective and skills you need to work through the deal. Learn why exit planning is different from succession planning. Sell what you've built for maximum profit and minimal tax. Become someone else's exit strategy for the best possible terms. Avoid the common and critical mistakes in the M&A space. A successful exit strategy requires the expertise of a CPA, JD, CVA, ASA, MCBA, and a CFA. You must either bring these people to the table, or acquire these skills yourself. *Buying, Selling, and Valuing Financial Practices + Website* gives you the essential knowledge and helpful tools you need to execute an optimal deal"--

"The specific purpose of this book is to help you understand how to sell what you've built to someone else for maximum value and at optimum tax rates, and/or to successfully complete an acquisition and become someone's exit strategy, also on the best possible terms, with minimum risk, writing off the entire purchase price over time"--
