

1. Record Nr.	UNISA990000287930203316
Autore	CHIANG, Alpha C.
Titolo	Introduzione all'economia matematica / Alpha C. Chiang
Pubbl/distr/stampa	Torino : Boringhieri, 1978 (, 1993)
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Descrizione fisica	769 p. ; 24 cm
Collana	Testi e manuali della scienza contemporanea , Serie di economia
Collocazione	COLL IZ 11 XXX.B. Coll. 69/ 9 (COLL IZ 11) XXX.B. Coll. 69/ 9a (COLL IZ 11) 330 TMSC (5)
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2. Record Nr.	UNINA9910815424103321
Autore	Grau David, Sr.
Titolo	Succession planning for financial advisors : building an enduring business // David Grau, Sr
Pubbl/distr/stampa	Hoboken, New Jersey : , : Wiley, , 2014 ©2014
ISBN	1-118-86652-5 1-118-86642-8 1-118-86641-X
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Descrizione fisica	1 online resource (224 p.)
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Nota di contenuto	Succession Planning for Financial Advisors; Contents; Preface; Acknowledgments; Introduction; CHAPTER 1 The Succession Conundrum; Practices Built to Die; What Exactly Is a Succession Plan?; Why You Need to Create a Succession Plan Now; Realizing the Value of a Lifetime of Work; Recruiting Next-Generation Talent to Grow Your Business; Preserving and Protecting What You've Built; Your Clients Are Watching You!; Why This Industry Struggles with This Concept; The Evolution of the Solution; Mind Your Own Business; The Opportunity at Hand; CHAPTER 2 How to Start Creating Your Succession Plan Defining Your GoalsRethinking Your End-Game Strategy; Determining a Precise Starting Point; Building a Foundation for Success; Facing Your Biggest Challenges; The Persistence of a Job Mentality; Revenue Sharing: Heads They Win, Tails You Lose; Fracture Lines!; Equity-A Powerful Business-Building Tool; Valuing a Financial Services Practice; Recurring versus Nonrecurring Revenue; Cash Flow Quality Factors; Transition Risk Factors; Marketplace Demand Factors; Addressing Insurance-Based Practices; Impact on Value of the Payment Terms; Profitability and Its Impact on Value

Practicing Equity ManagementBuilding Profit-Driven Businesses;  
CHAPTER 3 Transforming Your Practice into a Business; Assessing What You Have Built; A Building Problem, Not a Planning Problem; A Parable; Building Your Ship; Rethinking Your Compensation System; Balancing Revenue Strength and Enterprise Strength; Selecting the Right Entity Structure; What You Need to Know; Limited Liability Companies versus S Corporations; Remodeling Your Cash Flow; Step One: Collecting the Revenue; Step Two: Paying Competitive Wages for Work Performed; Step Two and a Half: Bonuses

What Exactly Is a Continuity Plan?Basic Components of a Continuity Plan; Types of Agreements; Revenue-Sharing Agreements; A Guardian Agreement; Buy-Sell Agreements; Funding Your Continuity Plan; Continuity Plan Dos and Don'ts; A Powerful Acquisition Tool; Communicating Your Plan; CHAPTER 6 Charting Your Succession Course; Exit Strategies versus Succession Plans; Selling Your Practice; Selling Externally (to a Third Party); Internal Buyout (Selling Internally to a Partner or Key Employee); Something Different: The GlidePath Strategy; Mergers; What Doesn't Work in This Industry  
Granting of Ownership

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#### Sommario/riassunto

This book is going to challenge you and everything you think you know about succession planning. For independent advisors, succession planning is quickly becoming the cornerstone to a strategic growth strategy designed to perpetuate their business and their income streams beyond their own lifetime, while providing a multi-generational service platform that attracts and rewards younger advisors. This makes succession planning one of the most, if not the most, important practice management tools in this industry today. As an independent financial advisor, now is the

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