Cambridge
# Succession and Acquisition Solutions

**Innovation in financial solutions.**
Succession, continuity, and acquisition planning for your business.

CAMBRIDGE

## Cambridge offers a broad range of choices regarding advisor-focused solutions

Since the firm was founded, Cambridge has been focused on providing innovative solutions. Being at the forefront of continuity, succession, and acquisition planning from day one, Cambridge has its own formal succession plan in place to sustain independence and private ownership. Cambridge is well positioned to support advisors in formalizing their own continuity and succession plans, to grow and build sustainable businesses.

## It's time to start planning for your future

Proper planning ensures the protection of your clients' needs and the security your business deserves. Over the years, Cambridge has helped hundreds of advisors create succession plans and acquire, sell, or merge businesses.

Realizing the significance of the opportunity to provide guidance and support to advisors on both buyer and seller sides of a transaction, Cambridge established an in-house team dedicated to this area. The Succession and Acquisition Solutions Team works to support your goals in continuity and succession planning, as well as practice acquisitions.

Whether you are looking to create a succession plan, grow your business through a merger or acquisition, or structure a buyout with an existing partner, our in-house team can help simplify the process, bringing years of experience to you and your practice.

End-to-end consulting is available in the areas of acquisition strategies, business valuation and consulting, customized document preparation — including often overlooked clawback provisions — and financing with flexible options.[1]

Whether you are planning a staged pullback, full retirement, or are looking to acquire another practice, we have resources in place to help manage your transaction.

## Succession and Acquisition Planning

The future of your business is our priority, and we have immediate solutions ready for implementation to protect the interests of your business, clients, and heirs. Our solutions include:

### Business valuations

- Market-based, risk-adjusted valuation methodology incorporating factors such as geography, client demographics, and asset concentration combined with a free cashflow approach designed to produce a highly accurate valuation

### Consulting

- One-on-one customized consulting on all phases of practice acquisition, merger, or sale
- Customized (death and disability) and succession (retirement or acquisition) documents, designed to help reduce or eliminate outside legal fees
- Post-transaction client retention strategies
- Continuity *Express*® ensures that advisors have, at minimum, a written emergency continuity plan in place that we can back or fund if no partner or successor has been identified. This program is complimentary to advisors with Cambridge.

### Agreements

- Continuity Plan Agreements, Asset Purchase Agreements, and supporting documents provided

### Customized lending solutions[1]

- Flexible options to fit your needs

## What are your goals?

**Looking to acquire a practice?**
We will help guide you through the entire process, from end to end.

**Thinking about retirement?**
We can help identify the right successor who will carry on your vision.

**Don't know where to start?**
Contact the Succession and Acquisition Solutions Team (successionsolutions@cir2.com) at 800-777-6080 to discuss how we can support your business today and in the future.

## Cambridge **Succession and Acquisition Solutions**

Committed to supporting advisors in planning for the long-term independence and integrity of their businesses

For information or to schedule a consultation, contact the Succession and Acquisition Solutions Team (successionsolutions@cir2.com) at 800-777-6080.

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[1]Subject to separate underwriting review process