Financial Planner Seeking Retirement or Succession Plan

ADVANCE WEALTH
MANAGEMENT SERVICE

Expertise in leading families through their financial lives

According to a 2018 study by the Financial Planning Association and Janus Henderson Investors, 73 % of advisors lack a formal succession plan. The Wealth Management industry is about to face a wave of retirements with the average age in the industry at 55, with 20% of the industry being 65 or older according to the 2019 study by J.D. Power. Having a succession plan is important to your clients, they want to know they are in good hands when you retire or if anything happens to you. Put them at ease and begin the process sooner rather than later.

If you are feeling ready to begin the succession process and would like to align yourself with comprehensive financial planning team that prides themselves in their fiduciary commitment, then please read more about the Advance Wealth Management Service (AWMS) team below and reach out to us so the discussion can begin.

- About AWMS:
  - AWMS maintains a fiduciary commitment to advise our clients based on what is optimal for their financial future.
  - Utilizing sound financial planning principals, our advisors have been privileged to assist hundreds of clients in navigating their financial lives. Working in partnership we help create realistic goals offering an opportunity for comfort and clarity.
  - Our team, led by our advisors with more than two decades of experience, AWMS is in a unique position to assist in the understanding of our financial world. Alleviating our clients concerns regarding their financial futures, we give our clients a perspective that enables them to live the lives they have envisioned.
- What AWMS Offers:
  - Partnering with AWMS to develop your retirement transition plan allows you to maintain your focus on client service and business development as we learn more about you and your clients while develop lasting relationships.
  - We have a proven track record of transitioning retiring advisors while maintaining client stability and business continuity.

- We have developed custom client service schedules using our CRM so that client service never wavers throughout the transition process.

- The AWMS Culture:
  - Our team consists of passionate individuals that share and hold true to our Core Values; Diligence, Intelligence, Accountability and Balance.
    - Diligently pursuing our money management and client service principals.
    - Intelligently in pursuit of weekly content for personal and professional improvement for the benefit of our clients and ourselves.
    - Accountable to our growth metrics both personal and professional.
    - Striving for conversations on balance in life for our team members and our clients.
- Retiring Financial Planner's Qualifications:
  - Be at least two years and no more than five years from retirement so that we may work alongside you throughout the transition.
  - Assets under management of $30 Million or more.
  - Must Have Clean U4/U5
  - Similar Core Values

For a confidential conversation, please call 616-363-3209 or e-mail algunn@awm-s.com and Amanda will get you scheduled for a discussion about your retirement future. To learn more about us check out our website www.awm-s.com.