Agenda:

1. Welcome & Opening Remarks

- Introduction and session objectives
- Why growth and transition planning are critical for independent advisors

2. Key Challenges Facing Independent Advisors Today

- **The Impending Advisor Shortage**: Insights from McKinsey's latest study
- **Rising Demand for Financial Advice**: How client expectations are shifting
- **Recruitment & Retention Struggles**: The challenge of finding and keeping top talent
- **Technology & Productivity Pressures**: How AI and automation are reshaping the industry
- Group discussion: How are these challenges impacting your practice?

3. Understanding Partial Sales: Monetizing Your Book Without Exiting

- What is a Partial Sale, and when does it make sense?
- Identifying segments of your book for optimization
- Strategies for pricing and structuring a Partial Sale
- **Live demo**: How to list and manage a Partial Sale
- Case study: How one advisor successfully used a Partial Sale to grow

4. Mastering Deal Structures: Financial Mechanics for Buyers & Sellers

- Overview of different types of deal structures (earnouts, revenue sharing, lump sum, etc.)
- Financial considerations: Tax implications, valuation methods, and risk management
- **Live demo**: Exploring deal structure options through interactive modeling
- Group discussion: Structuring a deal that benefits both parties

5. Succession Readiness: Ensuring a Smooth Transition

- Self-assessment: Is your practice succession-ready?
- Common mistakes and roadblocks in succession planning
- Creating a transition roadmap: Internal vs. external exit strategies
- **Live demo**: Succession Readiness Tool – how to evaluate and improve your readiness score
- Group discussion: Overcoming real-world succession challenges

6. Q&A, Key Takeaways & Next Steps

- Open floor Q&A: Addressing individual concerns and strategies
- Action plan: How to start implementing these strategies today
- Closing remarks and available resources for ongoing support