

What will the advisor learn from this presentation?

When a client sells their business, the advisor can benefit by using many of the products that they are licensed to sell.

The advisor will realize that there are many estate planning opportunities for the client in this situation. Investment and retirement products are only a couple of products that the advisor can recommend and there are more.

Presentation Overview

Short of winning a lottery, one of the biggest financial win-falls a client can experience results from the sale of a business. Looking forward, as baby boomers age and implement retirement and estate strategies, the number and value of business exits is expected to increase.

Advisors that assist with this process can also receive a win-fall. In this breakout, advisors will learn how to identify opportunities, coordinate resources, participate in, and benefit from their client's business exits.

All breakout attendees will receive a one-hour complimentary consulting session for their clients valued at \$300.