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### Immediate returns

 <b>EQUITY</b> Leverage value today	 <b>TRENDS</b> Flexible systems	 <b>PLAN</b> Insight into process
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### What, me worry?

 Are your clients profitable?	 How long does a transition take?	 Can you keep things running smoothly during the process?
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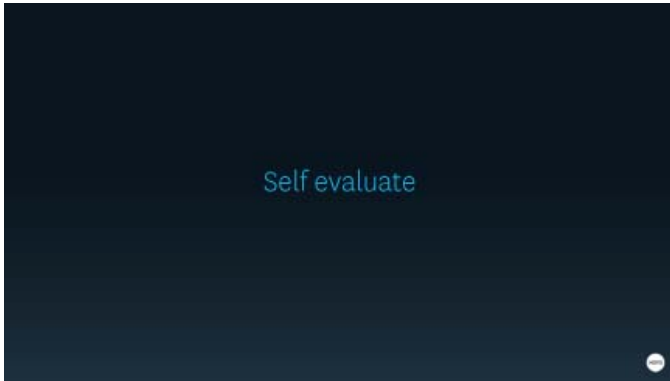
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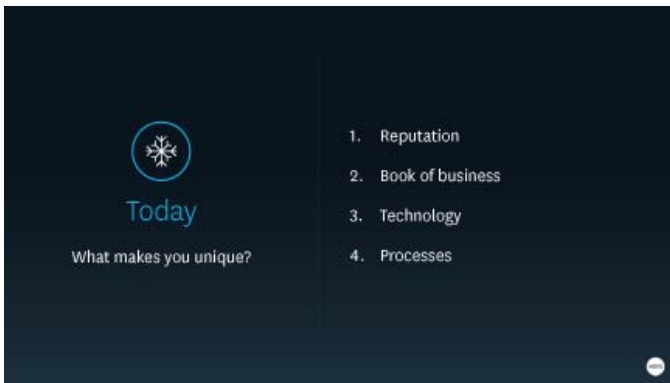
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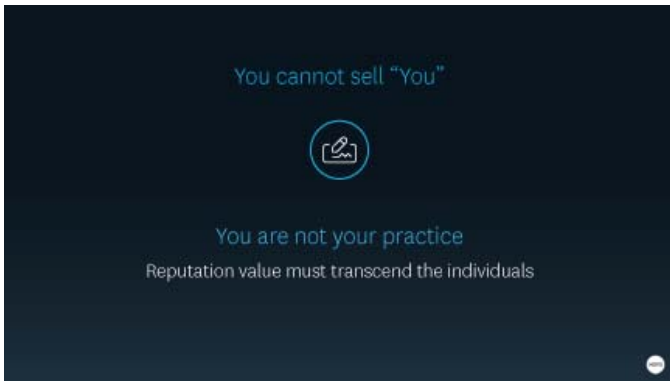
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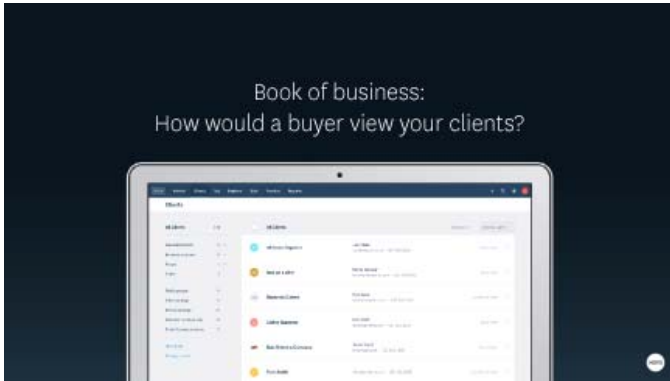
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Take action

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**Differentiate**  
Better firm management

1. Creating value
2. Trusted advisor
3. Change the workplace
4. Collaborative staffing model

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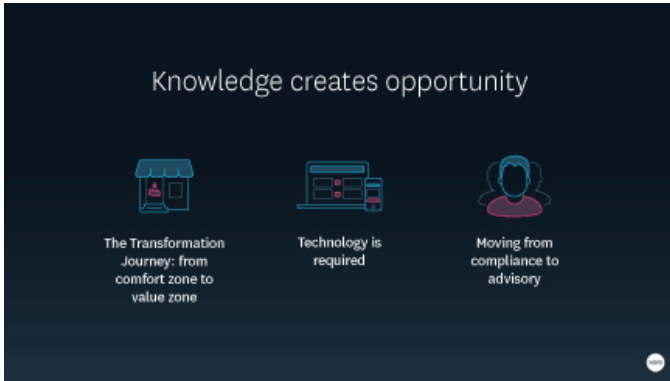
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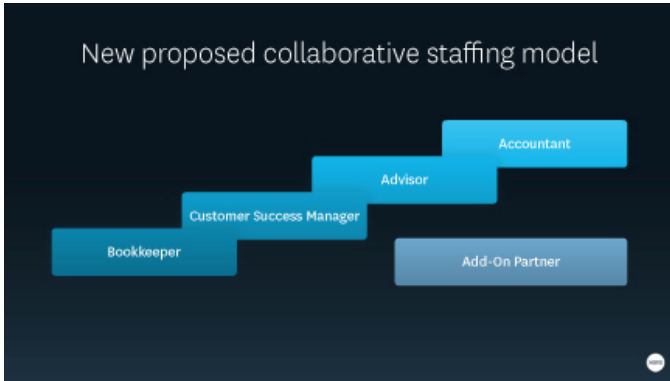
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Now the business is ready

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- Destinations
- Three paths to choose from
1. Internal successor
  2. External purchase
  3. Merger

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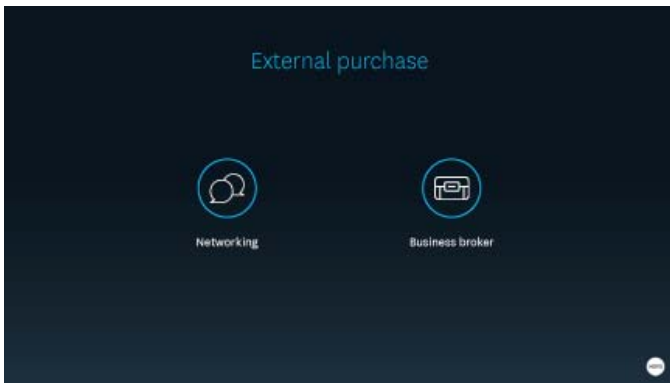
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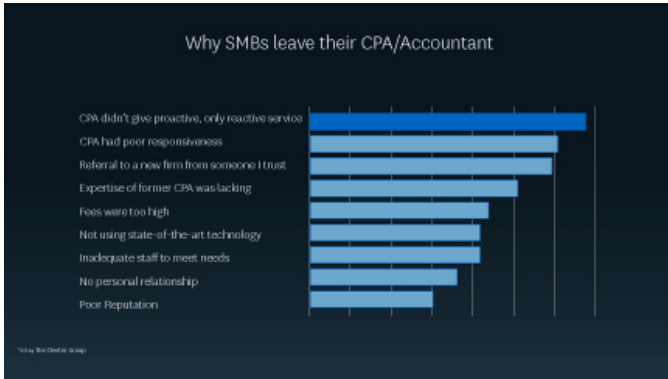
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**Allan Koltin**  
Koltin Consulting Group

#### Tips for buyers

- Know how you assess value
- Have both capital and workforce available
- Get buy-in from internal stakeholders

#### Tips for sellers

- Have consensus on goals from all partners
- Get an outside advisor to help navigate
- Be realistic about value of the practice

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### Reasons to merge

- Provide new services
- Broaden leadership
- Serve new client types
- Solve weakness
- Become more profitable
- Cash out

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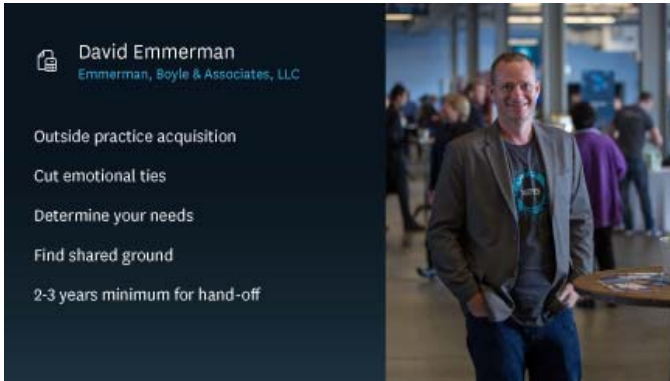
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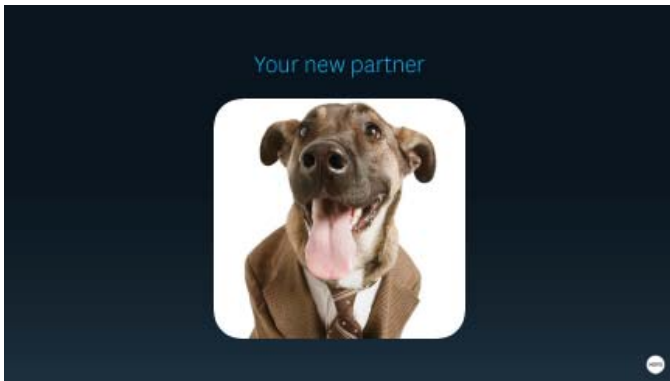
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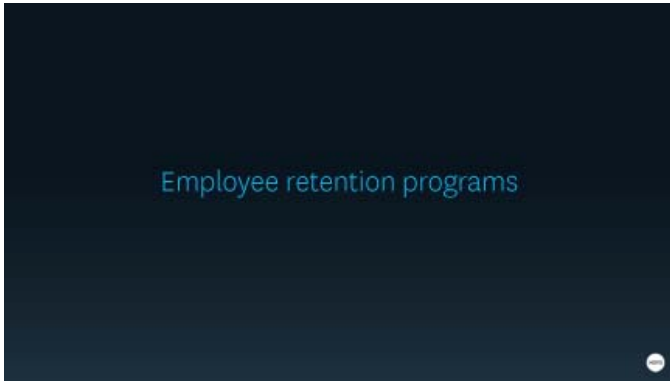
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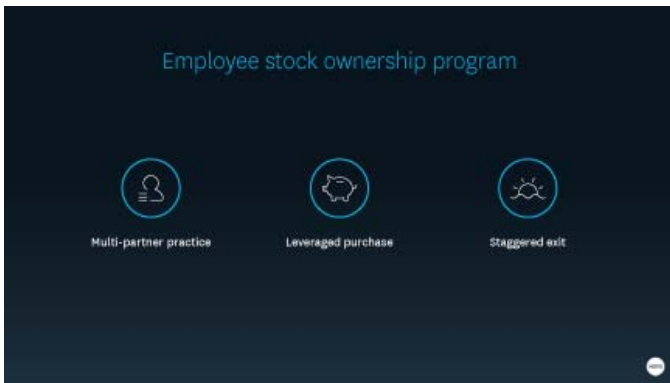
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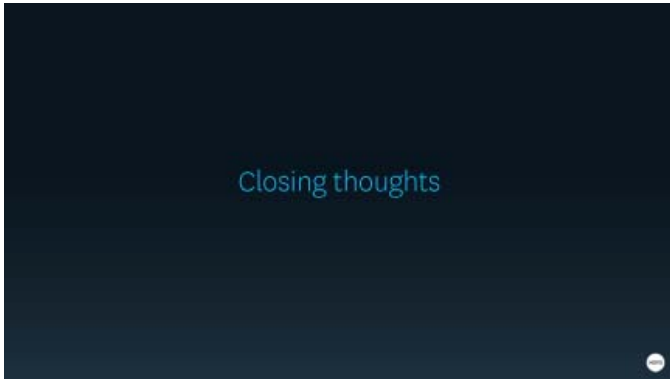
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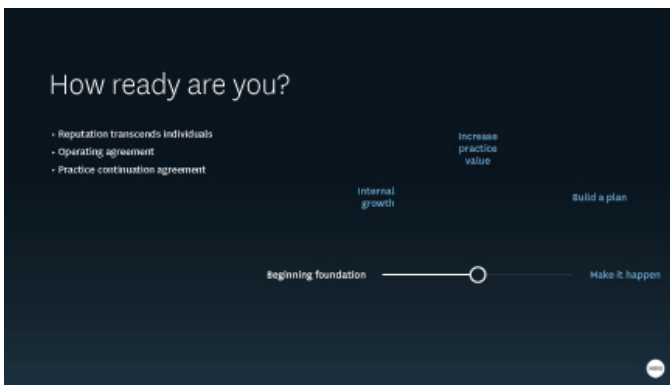
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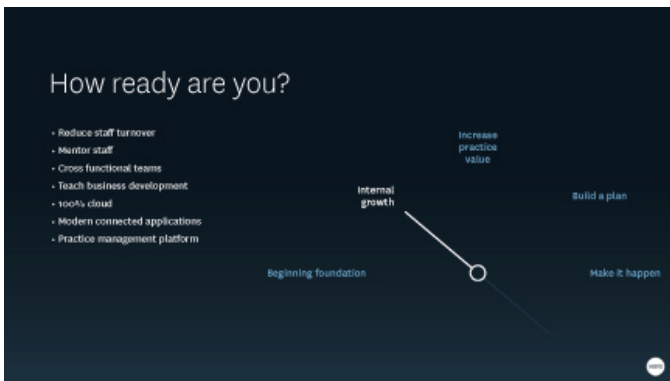
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### How ready are you?

- Fixed/value pricing
- Show recurring revenue
- Expand service offerings
- Focus on niche
- Create value for client
- Strengthen client loyalty

Internal growth

Increase practice value

Build a plan

Beginning foundation

Make it happen

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### How ready are you?

- Determine your needs
- Identify successors
- Solve weaknesses
- Client profitability reports
- Client segmentation reports
- Calculate practice value

Internal growth

Increase practice value

Build a plan

Beginning foundation

Make it happen

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### How ready are you?

- Cut emotional ties
- Choose a timeframe
- Get a broker
- Find shared ground
- Contract attorney

Internal growth

Increase practice value

Build a plan

Beginning foundation

Make it happen

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