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# How to Build Your Financial Advisory Business and Sell It at a Profit

By Al Depman



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**How to Build Your Financial Advisory Business and Sell It at a Profit** By Al Depman

Too many financial advisors simply close shop when they decide to exit the business?squandering untold goodwill and legacy business.

Why waste a great opportunity?

By applying the advice of Al Depman, a.k.a. “The Practice Doctor,” you can transform your financial services practice into a legacy-focused business that will add substantial wealth to your retirement nest egg.

*How to Build Your Financial Advisory Business and Sell It at a Profit* walks you through the steps of developing, managing, and growing a profitable practice you can sell for enhanced value or bequeath to family members.

Depman guides you through the process of forming a sound plan for your financial services business, including how to:

- Create a team of advocates in marketing and administration
- Build a sophisticated referral process
- Develop sales and case development systems
- Write a best-practices operations manual
- Maximize new technology to streamline operations
- Put a succession plan in place

Building a long-term business model is not just good for your future. It will also make you happier and more profitable today. You’ll be able to spend more time with clients. You’ll put more energy into finding new ones. You’ll focus more on referral sources. And someone else will do the grunt work.

Use *How to Build Your Financial Advisory Business and Sell It at a Profit* to build your business into more than a simple means to a paycheck?and reap the rewards of your hard work long after you choose to leave the firm.



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## **How to Build Your Financial Advisory Business and Sell It at a Profit By Al Depman Bibliography**

- Sales Rank: #1518212 in Books
- Published on: 2009-08-03
- Ingredients: Example Ingredients
- Original language: English
- Number of items: 1
- Dimensions: 9.30" h x 1.09" w x 6.40" l, 1.40 pounds

- Binding: Hardcover
- 352 pages

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### Editorial Review

From the Back Cover

**Transform your practice from today 's paycheck into tomorrow's nest egg**

“For years, Al Depman has proven a valuable resource for financial advisors. When applied consistently, his core principles will improve results. Get ready as Al helps you take your practice to the next level!”

**?Thomas P. Burns, chief distribution officer, Allianz Life Insurance Company of North America**

“North Star has benefited from Al's work and guidance, but the best part is that Al does all of this for the right reason?to bring out the best in all of those he works with.”

**?Edward Deutschlander, CLU, CLF, Co-President, COO, North Star**

“My work with Al Depman has taken my practice to an entirely new level. He has also inspired me to mentor others. By helping other advisors reach to the next level, it enforces my practice management and development.”

**?Lisa Dale, CFP, Waddell & Reed**

“For too long, financial advisors have focused on pushing product instead of building relationships, the true measure of a practice's worth. Al Depman shows advisors how to build a practice they can be proud of.

‘Must reading.’”

**?Mitch Anthony, author of *Storyselling for Financial Advisors* and *The New Retirementality***

About the Author

**Al Depman , CLU, ChFC, CMFC, BH**, is the owner of Practice Management Consulting. He is best known for his “Practice Management Assessment Tool” and his articles that appear on Practicetools.net and MitchAnthony.com, where he is the resident business-practice consultant. Depman serves as the national Practice Management Consultant for Securian (Minnesota Life) and has also worked with advisors from Waddell & Reed, AIG, LPL, State Farm, Prudential, NY Life, Metropolitan, and many independents, as well as from big brokerages, including Morgan Stanley and Merrill Lynch.

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**Anna Maples:**

This How to Build Your Financial Advisory Business and Sell It at a Profit book is just not ordinary book, you have after that it the world is in your hands. The benefit you receive by reading this book is definitely information inside this reserve incredible fresh, you will get details which is getting deeper an individual read a lot of information you will get. This How to Build Your Financial Advisory Business and Sell It at a Profit without we recognize teach the one who reading it become critical in contemplating and analyzing. Don't be worry How to Build Your Financial Advisory Business and Sell It at a Profit can bring once you are and not make your tote space or bookshelves' become full because you can have it within your lovely laptop even phone. This How to Build Your Financial Advisory Business and Sell It at a Profit having good arrangement in word and also layout, so you will not experience uninterested in reading.

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**Larry Carvajal:**

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**Christopher Williams:**

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