INTRODUCING
BUSINESS PATHFINDER
ADVISOR ACQUISITION & SUCCESSION SERVICES
Whether you’re looking to organically grow, acquire another financial advisory firm, or if you’re at the sunset of your career and looking to sell your practice, careful planning is essential.

But where do you start? Finding the right advisory firm match might feel like looking for a needle in a haystack. And, even when a potential firm is identified, how do you go about putting a deal in place and securing financing?

A successful business transition requires precise planning, just like when you help clients build their personalized financial plans.

To help advisors like you, SEI has joined our experienced relationship managers with industry-recognized FP Transitions and The Bancorp to provide the most comprehensive acquisition and succession program available today, designed around your specific business requirements.

Deciding on your firm’s transition is one of the most important professional decisions you will make; one that you don’t have to coordinate alone. SEI has identified the specialists needed to maximize the inherent value in your firm and optimize the transaction, all in one place.

SEI will serve as the coordinator for all aspects of the program, and together with FP Transitions, we’ll help prepare you for the process, guiding you with education and building a Roadmap for your transaction. When you’re ready to implement, a complete suite of services are available.

**How it Works**

1. **Assessment:** Start down the path by working with your established SEI Relationship Manager to complete a practice assessment and begin the discovery process, exploring your goals and key information about your business.

2. **Roadmap:** Based on your input, a Roadmap will be produced including a profile of your practice, a project time line and a cost estimate.

3. **Strategic Focus:** Are you a candidate for internal or external succession, acquiring another firm, or investing more time in your current practice? You’ll find out who you are and start evaluating next steps.

4. **Execution Preparation:** Now it’s time to put the deal in place. At this stage, FP Transitions will help you calculate how much your firm’s value is, draft a formal transition plan for your firm and identify another advisor firm who matches your firm’s culture.

5. **Execution:** To conclude, FP Transitions, with support from your SEI Relationship Manager, will help with intricate details including deal support specialized for the niche financial advisory market. SEI has identified The Bancorp as a potential partner for your financial advisory firm to consider when making important financing decisions (if needed).
About Our Strategic Partners

FP Transitions

FP Transitions, based in the community of Lake Oswego, Oregon, just south of Portland, has a team of 30 people that specialize in building financial service businesses of enduring and transferable value. And if the building process isn’t for you, FP Transitions also created and continue to operate the largest open market for buying and selling financial practices. Either way, they are the experts at helping you manage the equity you’ve built over a lifetime of work in this industry. Their goal is to help you plan for your future, and to be ready when it gets here.

FP Transitions specializes in the valuation and analysis of the intangibles that make a financial services practice unique and valuable. But valuing over 5,000 independent businesses is only the starting point. FP Transitions’ consultants guide owners and advisors in planning for the inevitable end of their careers, turning this into a positive event. They employ strategies and thinking that build upon a lifetime of work and trusting client relationships with a plan of succession designed to simultaneously realize value for the founder and perpetuate the business for the next generation of advisors.

The Bancorp

Founded in 2000, The Bancorp creates customized banks for hundreds of affinity partners, setting a new standard in financial services innovation. Today, The Bancorp remains one of the few financial service companies in the world dedicated to providing private-label banking and technology solutions for non-bank companies ranging from entrepreneurial start-ups to those on the Fortune 500.

The Bancorp’s private-label programs focus on four main business segments: Healthcare Solutions, Payment Solutions, Payment Acceptance and Institutional Banking. In addition to these programs, The Bancorp offers a full array of lending services, including Commercial Lending, Fleet Management and Leasing and Government Guaranteed Lending.

Take the Next Step

If you’re interested in seeing if your firm is a candidate for a merger, acquisition or succession plan, contact your SEI relationship manager by calling 800-734-1003 to put your practice on the path to a Business PathFinder Roadmap.
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