

Business transitions roadmap.

Transition is inevitable for every advisory business. Use this guide to help you gain clarity and learn how we can help you take action toward your ideal future.

The business

- What do you aspire to build?
- How do you want to impact clients, your community, and beyond?
- What financial outcomes do you hope to achieve?

Professionally

- What do you want your role to be in the business?
- What do you like to do day to day?
- What does success look like today? What about later in your career?
- Who do you want to benefit and protect professionally?

Personally

- What does work-life balance mean to you?
- Who do you want to benefit and protect personally?
- What personal goals do you want to achieve?

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CONSIDER A TRANSITION

Going RIA

🔍 [Explore toolkit](#)

2

GAIN EXPERT INSIGHT

📺 [Watch video](#)

- Is going RIA right for you?
- Designing your RIA
- Building your RIA
- Making the business model transition

3

ACCESS RESOURCES

📄 [Should I go RIA checklist](#)

📄 [Key partner checklist](#)

📄 [Profit and loss modeler](#)

📄 [RIA launch guide](#)

4

LISTEN TO ADVISOR STORIES

What one advisor would've done differently in communicating the transition to clients—plus how they reacted.

[Meet Jeremy Paul](#)

How a majority of client assets managed to be transferred within 60 days.

[Meet Chris Cousins](#)

Navigating succession

🔍 [Explore toolkit](#)

📺 [Watch video](#)

- Designing your ideal future
- Defining your succession
- Building your plan
- Best practices and takeaways

📄 [Succession guide](#)

📄 [Explore the SEI Pathfinder program](#)

A brush with death reinforces this advisor's take on the importance of succession planning.

[Meet John Taylor](#)

Buying and merging

🔍 [Explore toolkit](#)

📺 [Watch video](#)

- Preparing for an acquisition
- Sourcing and vetting sellers
- Negotiating the transaction
- Closing the sale

📄 [Buyer's guide](#)

Key lessons from an experienced buyer when considering growth through acquisition

[Meet Andrew Rosen](#)

Selling your practice

🔍 [Explore toolkit](#)

📺 [Watch video](#)

- Preparing for the sale
- Sourcing and vetting buyers
- Negotiating the sale
- Closing the sale

📄 [Seller's checklist](#)

📄 [Seller's workbook](#)

📄 [Explore the SEI Pathfinder program](#)



Schedule a consultation →

You don't have to navigate this journey alone. Learn how our experts and tools can help you transition your business with confidence.