

FROM FIRST CONVERSATION TO FIRST DAY

EXPLORE AN EXCITING OPPORTUNITY TO TRANSITION YOUR PRACTICE TO BECK BODE

Every advisor who has successfully transitioned a practice into the hands of a successor knows that it's a process that requires thought, care, and patience. It also calls for both parties to engage collaboratively and creatively. While no two succession journeys are the same, we have laid out a roadmap for what this process looks like with Beck Bode. We wish you good luck on your succession journey!

DISCOVERY

As we kick off our conversation, we each get to discover more about the other. We will share with you some tools that will help determine how good of a fit we are for each other's business.

1

DUE DILIGENCE

Should we both decide to pursue our our conversation in greater depth, we will ask you for detailed quantitative and qualitative information about your practice. We will ensure the confidentiality of our conversation by executing NDAs.

3

DEAL STRUCTURE & LEGAL REVIEW

Pretty self-explanatory. This is where we hammer out the fine print on the mechanics, financials, and legal details of our deal.

5

BECK BODE CLIENT INTEGRATION TEAM KICKS OFF

Our integration team takes over from here, to roll out client transition logistics, and the transition communication plan.

7

2

INVITATION TO HQ

Visit us at our offices for a tour and the opportunity to meet our team. There will be time to get to experience our unique vibe, and interact with key members of our team. And of course, to ask and answer questions.

4

ADVANCED DUE DILIGENCE

In this phase, we will discuss what integrating our practices may look like. How will you and your clients be best served through our structure and team? We will conduct an assessment on how well we may work together and explore potential obstacles.

6

CLOSE

We complete our talks, sign the papers, and welcome you on board!