CAMBRIDGE

Cambridge
Succession and Acquisition Solutions

Innovation in financial solutions.
Succession, continuity, and acquisition planning for your business.

Cambridge offers a broad range of financial professional-focused solutions

Since the firm was founded, Cambridge has been focused on providing innovative solutions. Being at the forefront of continuity, succession, and acquisition planning from day one, Cambridge has its own formal succession plan in place to sustain independence and internal control. Cambridge is well positioned to support financial professionals in formalizing their own continuity and succession plans, to grow and build sustainable businesses.

It's time to start planning for your future

Proper planning ensures the protection of your clients' needs and the security your business deserves. Over the years, Cambridge has helped hundreds of financial professionals create succession plans and acquire, sell, or merge businesses.

Realizing the significance of the opportunity to provide guidance and support to financial professionals on both buyer and seller sides of a transaction, Cambridge established an in-house team dedicated to this area. The Succession and Acquisition Solutions Team works to support your goals in continuity and succession planning, as well as practice acquisitions.

Whether you are looking to create a succession plan, grow your business through a merger or acquisition, or structure a buyout with an existing partner, our in-house team can help simplify the process, bringing years of experience to you and your practice.

The Succession and Acquisition Solutions Team is a fee-for-service solution. We provide end-to-end consulting in the areas of acquisition strategies, business valuation and consulting, customized document preparation – including often overlooked clawback provisions – and financing with flexible options.[1]

Whether you are planning a staged pullback, full retirement, or are looking to acquire another practice, we have resources in place to help manage your transaction.

Succession and Acquisition Planning

The future of your business is our priority, and we have immediate solutions ready for implementation to protect the interests of your business, clients, and heirs. Our solutions include:

Business valuations

- Market-based, risk-adjusted valuation methodology incorporating factors such as geography, client demographics, and asset concentration combined with a free cashflow approach designed to produce a highly accurate valuation

Consulting

- One-on-one customized consulting on all phases of practice acquisition, merger, or sale
- Customized (death and disability) and succession (retirement or acquisition) documents, designed to help reduce or eliminate outside legal fees
- Post-transaction client retention strategies
- Continuity *Express*® ensures you have, at minimum, a written emergency continuity plan in place that we can back or fund if no partner or successor has been identified. This program is complimentary to financial professionals with Cambridge.

Agreements

- Continuity Plan Agreements, Asset Purchase Agreements, and supporting documents provided

Customized lending solutions[1]

- Flexible options to fit your needs

What are your goals?

Looking to acquire a practice?
We will help guide you through the entire process, from end to end.

Thinking about retirement?
We can help identify the right successor who will carry on your vision.

Don't know where to start?
Contact the Succession and Acquisition Solutions Team (successionsolutions@cir2.com) at 800-777-6080 to discuss how we can support your business today and in the future.

Cambridge Succession and Acquisition Solutions

Committed to supporting financial professionals in planning for the long-term independence and integrity of their businesses.

For information or to schedule a consultation, contact the Succession and Acquisition Solutions Team (successionsolutions@cir2.com) at 800-777-6080 x3274.

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[1]Subject to separate underwriting review process