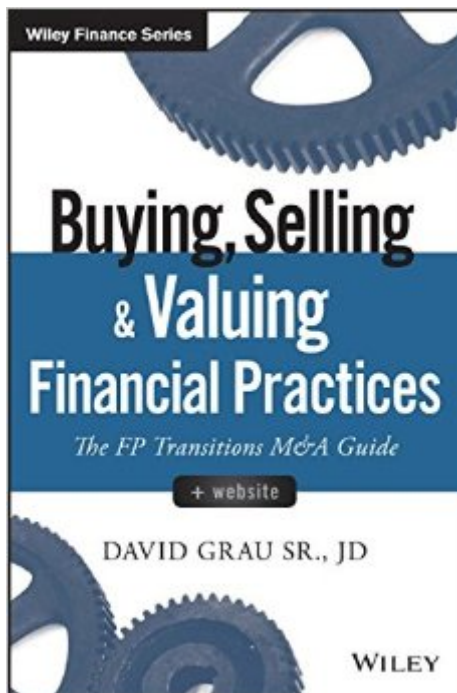


The book was found

# Buying, Selling, And Valuing Financial Practices, + Website: The FP Transitions M&A Guide (Wiley Finance)



## Synopsis

The Authoritative M&A Guide for Financial Advisors Buying, Selling, & Valuing Financial Practices shows you how to complete a sale or acquisition of a financial advisory practice and have both the buyer and seller walk away with the best possible terms. From the first pages of this unique book, buyers and sellers and merger partners will find detailed information that separately addresses each of their needs, issues and concerns. From bestselling author and industry influencer David Grau Sr. JD, this masterful guide takes you from the important basics of valuation to the finer points of deal structuring, due diligence, and legal matters, with a depth of coverage and strategic guidance that puts you in another league when you enter the M&A space. Complete with valuable tools, worksheets, and checklists on a companion website, no other resource enables you to: Master the concepts of value and valuation and take this issue off the table • early in the negotiation process Utilize advanced deal structuring techniques including seller and bank financing strategies Understand how to acquire a book, practice or business based on how it was built, and what it is capable of delivering in the years to come Navigate the complexities of this highly-regulated profession to achieve consistently great results whether buying, selling, or merging Buying, Selling, & Valuing Financial Practices will ensure that you manage your M&A transaction properly and professionally, aided with the most powerful set of tools available anywhere in the industry, all designed to create a transaction where everyone wins • buyer, seller, and clients.

## Book Information

Series: Wiley Finance

Hardcover: 320 pages

Publisher: Wiley; 1 edition (August 22, 2016)

Language: English

ISBN-10: 1119207371

ISBN-13: 978-1119207375

Product Dimensions: 6.4 x 1 x 9.3 inches

Shipping Weight: 1.1 pounds (View shipping rates and policies)

Average Customer Review: 4.2 out of 5 stars • See all reviews • (5 customer reviews)

Best Sellers Rank: #152,038 in Books (See Top 100 in Books) #29 in Books > Business & Money > Management & Leadership > Consolidation & Merger #32 in Books > Business & Money > Processes & Infrastructure > Purchasing & Buying #34 in Books > Business & Money > Industries > Financial Services

## Customer Reviews

Sometimes books are perfectly targeted for exactly the stage you are in your life or business. If you are even contemplating buying or selling an advisory practice, this book is just a Godsend. The state of our financial advisory industry is such that if you really want to become informed on the topic of how to buy or sell a practice/business, you really have two choices - Tibergien's/Dahl's book (which is also excellent, and still relevant after 10 years) and Grau's book. These are the bibles (and this one is absolutely current and reflective of exactly what's happening now in terms of valuations, deal structures, financing alternatives, etc. For example, 10 years ago, almost all deals were seller financed. Today, with the emergence of Live Oak Bank and similar cash-flow based lenders, the landscape has really changed and this book reflect that.) Beyond these two books, you really have to wander in the educational wilderness piecing together bits from here and there to become informed. There just aren't ANY other resources (I know of) which offer you an A-Z education in how to approach a deal wisely. This book does a great job of it. Of note is that it really starts with the premise that its job is to help you get the deal done. It's not about teaching you how to vanquish your opponent. In most cases, you'll end up in an economic marriage with your deal partner and this book recognizes that and helps you approach thinking about it all in a reasonable, collaborative way. The book offers a great amount of help with valuations, deal structure, financing, due diligence, tax issues, legal issues, and planning for a successful transition and client retention. I has helpful checklists and sample document templates.

[Download to continue reading...](#)

Buying, Selling, and Valuing Financial Practices, + Website: The FP Transitions M&A Guide (Wiley Finance) Corporate Finance: Corporate Finance Guide To Understanding Corporate Finance With Strategies For Business Owners For Utilizing Corporate Finance Including ... Finance Business, Theory And Practice) Banker's Guide to New Small Business Finance, + Website: Venture Deals, Crowdfunding, Private Equity, and Technology (Wiley Finance) Lessons in Corporate Finance: A Case Studies Approach to Financial Tools, Financial Policies, and Valuation (Wiley Finance) Financial Regulation and Compliance, + Website: How to Manage Competing and Overlapping Regulatory Oversight (The Wiley Finance Series) NO WEBSITE INTERNET MARKETING: Make Money by Starting an Internet Based Business, No Website Required... (Youtube Selling & Fiverr for Newbies) Selling on eBay: 44 Killer Profitable Items To Sell on eBay From Garage Sales, Thrift Stores, Flea Markets and More! (selling on ebay, ebay, ebay selling, ... ebay marketing, ebay selling made easy,) Valuing a Business, 5th Edition: The Analysis and Appraisal of Closely Held

Companies (McGraw-Hill Library of Investment and Finance) The Valuation of Financial Companies: Tools and Techniques to Measure the Value of Banks, Insurance Companies and Other Financial Institutions (The Wiley Finance Series) Mergers, Acquisitions, Divestitures, and Other Restructurings, + Website (Wiley Finance) Bond Math, + Website: The Theory Behind the Formulas (Wiley Finance) eBay: Find All You Need To Sell on eBay and Build a Profitable Business From Scratch, Step-By-Step (eBay, eBay Selling, eBay Business, Dropshipping, eBay Buying, Selling on eBay) WordPress: Made Easy!: The Complete Guide on How To Create a WordPress Website or Blog from Scratch Tailored For The Absolute Beginners! (WordPress, WordPress ... Development, WordPress SEO, Website design) Understanding Business Valuation: A Practical Guide to Valuing Small to Medium Sized Businesses Basics of Anesthesia: with Evolve Website, 5e (Stoelting, Basics of Anesthesia: with Evolve Website) SEO: Marketing Strategies to Dominate the First Page (Google analytics, Webmaster, Website traffic, Adwords, Pay per click, Website promotion, Search engine optimization) Coaching Websites That Convert: Build a Client Attracting Website & Avoid the 10 Website Mistakes That Drive Ideal Clients Away Wiley CPAexcel Exam Review Spring 2014 Study Guide: Financial Accounting and Reporting (Wiley Cpa Exam Review) Wiley CPAexcel Exam Review 2016 Study Guide January: Financial Accounting and Reporting (Wiley Cpa Exam Review) Wiley CPAexcel Exam Review 2015 Study Guide July: Financial Accounting and Reporting (Wiley Cpa Exam Review)

[Dmca](#)