



Amplify your growth through practice acquisition

Benefit from our experience and proven processes

We have practice acquisition down to a science — we've helped more than 500 advisors acquire practices since 2008.¹ We'll share the insights we've gained over the years to help make your acquisition a success.

Practice acquisition is one of the fastest means to growing your practice. In one move, you can broaden your client base, diversify your services, expand your referral base and provide new opportunities to your staff. Any acquisition is an opportunity to streamline your business. In addition to adding revenue, you can mitigate your cost of serving each client. We can help you make sure you have the right infrastructure in place to make a successful acquisition.

The Ameriprise practice acquisition team makes the process easier for you, including coaching on:

- Sourcing and due diligence
- Valuation and negotiation
- Flexible financing for qualifying advisors
- Final closing and onboarding

“We had a dedicated team who sat down with the seller, reviewed their assets and made sure they were aligned with how we wanted our practice to grow.”

JOSEPH PATES, CRPC®
FINANCIAL ADVISOR



Hands-on support through each phase of the transition

Our Practice Acquisition Team works with advisors in a variety of selling situations. We establish expectations up front and provide hands-on support to you through key phases of the transition. Here's how the process typically works:

1. Gather information

We'll take time to understand how the sellers run their business and what service their clients want. That way, you can find a practice that shares your values and vision.

2. Complete due diligence

Our team of specialists can provide support through each phase of the due diligence process. We'll help you gather reports, and review the seller's assets and revenue to assess the seller's product portability.

3. Plan integration and client communications

Our Practice Acquisition Team can help you develop an integration plan and draft client communications to announce the transition. And we can offer resources to help plan events and meetings where the clients can meet your team.

4. Help you transition your clients

Our transition team offers the support you need to help transition clients. From providing best practices for the introductory client meetings to ensuring quick asset transfer, the transition team supports you every step of the way.

Looking to sell your practice? We've got you covered there, too.

If you work with Ameriprise, you can decide if you want to sell your practice outright, transition it to another advisor over time, or scale back and work only with select clients. You can also choose to sell your practice to an Ameriprise Financial franchisee or to an Ameriprise Financial branch location.

The Ameriprise team has the knowledge and experience to help you understand what your practice may be worth, as well as the different payment structures that are common in the industry. And if you sell to Ameriprise, you'll have the option of flexible deferred payments.

Discover more about the Ameriprise difference by visiting joinameriprise.com/sell or calling our practice acquisition team at 888.267.8370

¹ Company data as of Dec. 31, 2016.

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