Seventy2 Capital
Wealth Management
WELLS FARGO ADVISORS FINANCIAL NETWORK

Take control of the future of your business

Your legacy matters, too

- You've dedicated your career to serving your clients and protecting their legacies. Now it's time to protect the future you've earned for yourself and your clients by preparing and executing a strategy to help successfully transition your practice on your terms.

What can we offer you at Seventy2 Capital?

Simply put, experience and expertise. We can offer you flexibility and choice as you step away from the day-to-day management of your practice. And we can help you avoid common mistakes with proper planning and collaboration.

Although you may feel limited by the options currently available to you, by working with Seventy2 Capital you'll have a myriad of options for choosing how and when you retire. This includes selling your book of business, finding a succession plan, or entering into a sunsetting agreement that aligns with your preferred timing and method of transition.

We can help structure a plan in a way that best suits your interests and that of your clients, and we can help coordinate your transition and everything that comes with it.

About Seventy2 Capital

Seventy2 Capital's principals draw on decades of experience at some of the largest Wall Street firms, along with backgrounds as asset managers, securities traders, and regulators. With this comes a deep understanding of global financial markets and macroeconomic policy that is specific to the industry.

We have grown to manage $1.2 billion in client assets* in under four years and are looking for advisors who want to grow in a dynamic environment.

*As of 1/30/2021

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Secure your legacy

- Your legacy is more important than just retiring or transitioning out of the industry. It is the culmination of the years of hard work you have done to do what is best for your clients. Typically, a succession plan involves finding someone to take over your practice and to work directly with your clients, but it can also involve creating a plan for the next phase of your life.

Step 1

Discover the Why

Have a discovery conversation with Seventy2 Capital to review common concerns, options, and opportunities for your exit or succession plan from the industry.

Explore what your legacy means to you, your clients, and your loved ones.

Step 2

Pinpoint the Value

Have a practice valuation completed on your business.

Understand the drivers and key metrics that determine the value of your practice.

Step 3

Choose Your Future

Choose your successor and contemplate how you desire to secure your legacy.

Leverage Seventy2 Capital to identify and network with possible successor candidates for your practice.

Step 4

Develop Your Plan

Work with the Seventy2 Capital team to create an Exit/Succession Plan.

Develop a transition, timeline, documents, and staff workflow.

Step 5

Activate the Plan

Communicate how you plan to secure your legacy with your clients to help ensure a seamless transition.

Work with Seventy2 Capital for 1:1 coaching around practice integration and client communications.

Step 6

Finish Well

Celebrate what you have achieved as a Financial Advisor/Business Owner.

Whether you're actively looking to transition your business or are just starting to explore the possibility of retirement, there is value in starting to do groundwork sooner rather than later to take control of your legacy and the financial future you've earned.

To learn more about the business transition and retirement options available for your practice,

*contact Tom Fautrel at **301-298-2223** or*
Thomas.Fautrel@Seventy2Capital.com

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