OLEY KINSER
CONCIERGE WEALTH

YOUR PRACTICE SUCCESSION *with us*

CLIENT EXPERIENCE

- **Trusted, Caring, Competent.**
- **Strength of our team infrastructure** (8 professionals)
- **Decades of experience**, ensuring stability and growth for our clients.
- **Focused on protecting existing clients** while driving future success.
- **In-House Expertise**: 3 Certified Financial Planner™ professionals and 1 CFA® charterholder.
- **Limited client base by design** allows for personalized service in all wealth management facets.
- **Our clients are our top priority.**

ACQUISITION EXPERIENCE

- **Proven Acquisition Success**
- **Completed two successful acquisitions** (2022 & 2023) with high (95%+) retention of revenue.
- **Focused on continuity** by retaining team members and minimizing client disruption.
- **Diligent preparation and planning** to ensure a smooth process for clients.
- **Scalable infrastructure** allows for growth through acquisitions and marketing.
- **Smooth and patient integration of our books of business** into one streamlined planning and investment structure.

DUAL MONETIZATION

- **One: Raymond James' Flexible Transition Package** is tailored to you based on the economics of the book and timing of the succession.
- **Two: Oley Kinser Concierge Wealth purchase** based on pre-determined multiple – combination of single fixed and then multi-year payments.

KEYS TO SUCCESS

- **Methodical, patient "handoff"**
- A fit from both a **personal and professional perspective**.
- **Planning and preparation are essential.**
- This is a **culmination of your life's work and reputation.**
- Aim for a **win-win-win for you, your clients, and us.**

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