

SuccessionFully™

The Complete Succession Solution for Financial Advisors

Powered by The AmeriFlex Group®

THE SUCCESSION PROBLEM

The advisory world will face the largest transition of wealth and leadership in its history — as tens of thousands of advisors retire, trillions in assets will soon need new stewards.

“100,000 advisors expected to retire by 2034.”

Bloomberg

“The industry faces a looming shortage of financial advisors.”

McKinsey
&Company

“Financial industry in danger of facing advisor shortage”



CERULLI
ASSOCIATES

“The advisor succession crisis isn’t going away.”



THE SUCCESSION PROBLEM

40%

of advisors retiring
in next 10 years

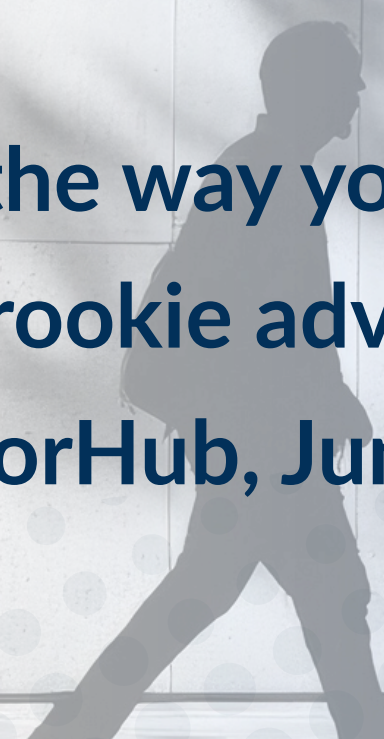
\$12T

of total industry
assets

25%

of advisors unsure
of their plan

Source: “Transitioning your practice the way you want,” Cerulli Associates, 2022; “More than 72% of rookie advisors still fail out of the industry: Cerulli,” AdvisorHub, June 2023.



THE SUCCESSIONFULLY™ SOLUTION

The financial services industry is fragmented, there is no single service to guide and assist advisors who plan for retirement or succession. Yet the need has never been greater.

- **SuccessionFully™**, powered by **The AmeriFlex Group®**, was created to deliver an **integrated platform** that combines AI, human expertise, and real-world experience to support advisors at every stage of succession.
- Our approach is simple — we **design, build, and implement** a customized solution for each advisor.
- With our **1-2-3 pricing model**, advisors receive a tailored plan and a clear roadmap from start to finish.
- And best of all, **we connect every key player** to ensure a seamless, successful outcome for each advisor we engage.



Why SuccessionFully™ Works

- Built by advisors, for advisors
- Integrated tech + human guidance
- Custom solutions designed for **your goals**

THE SUCCESSIONFULLY™ SOLUTION

We bring it all together!



THE SUCCESSIONFULLY™ BLUEPRINT

A clear path. A proven process. Your succession, simplified.

1



Design

- Together, we outline your **ideal vision** — defining goals, timelines, and continuity priorities.
- This step produces your **SuccessionFully™ Blueprint** — a custom roadmap built entirely around you.

2



Build

- We bring together all the **critical components** — valuation, structure, and transition strategy — to shape a fully **personalized plan** designed for real-world success.

3



Implement

- With your **customized plan** in place, we **coordinate all moving parts** and guide you through a seamless launch of your **SuccessionFully™ Solution**.



THE 1-2-3 SUCCESSIONFULLY™ PRICING PLAN

Introductory Call

- Determine your **goals and needs** through a brief **call or Zoom meeting**.

Included in pricing:

- AmeriFlex®-sourced valuation (first year included)
- **Rebate of all fees if the advisor affiliates with The AmeriFlex® Group**

Not included:

- Buy-sell and additional legal agreements
- Legal or tax advice



\$1,000 Engagement

- Discuss your high-level design framework and overall succession vision.



\$2,000 Engagement

- Develop your pre-implementation SuccessionFully™ Roadmap with clear next steps.



\$3,000 Implementation Phase

- Establish and commence your confirmed plan implementation and timeline.

Contact Us



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