



TRANSFORMING THE WAY THE WEALTH MANAGEMENT INDUSTRY DISCOVERS OPPORTUNITY

ABOUT PRACTICE/DYNAMICS

Practice Dynamics' **Advisor Transition Management Platform** is the first end-to-end data-driven system to help wealth management enterprises recruit, grow, and retain advisory businesses while reducing time and costs related to transitions.

MORE THAN
20,000
FIRMS IN OUR DATABASE

RIA & OSJ Features:



ENTERPRISE MANAGEMENT

- Single login for executives to view eEvaluation status and progress of all affiliated firms
- Ability to categorize firms so that they are searchable/sortable via specific tags
- Ability to view firm details and usage history
- Ability to identify high performers at a glance



PRACTICE MANAGEMENT

- Business health summary
- Over 50 KPIs in Business, Client and Market stability categories
- Pro-forma financials projecting 5 years into the future of your firm
- 4 standard valuation calculations



SUCCESSION MANAGEMENT

- Planned succession management via the TrueMatch public and private marketplaces
- Unplanned succession management via TrueContinuity's secure cloud-based continuity locker and alert workflows.