



# EQUITYBUILDER™



## The Most Powerful Benchmarking Tool in the Financial Services Industry

There's never been a better or more important time to build a stronger, more valuable financial services business. Building equity is about more than just adding new clients — you need a plan, a clear goal, and the information to succeed. On your path to success, let EquityBuilder™ be your map.

### Benchmark Against Your Peers, Benchmark Against the Next Level

This unique tool will show you how your practice compares against your peers, providing an opportunity to “look over the shoulder” of other owners of equal value. EquityBuilder™ will show you what your direct competition does, and how they do it.

In addition to benchmarking data from your peers, EquityBuilder™ also provides comparative data from a target group of advisors with twice your value. If you want to make your business better, stronger, you need to study the best, and learn what they are doing. Establish your practice's financial goals and evaluate your progress over time against this target group.

### Build a Stronger, More Valuable Financial Services Business

- How efficient are other firms your size?
- How many clients do your peers have and what do they charge?
- What do advisors twice your size spend their time doing?
- How do your staffing costs and efficiency levels compare to your peers?

The EquityBuilder™ report will answer these questions, and many more, helping you learn from the best while keeping an eye on the immediate competition.

EquityBuilder™ provides advisors with a complete range of market benchmarks to help them set realistic goals for improving their practice in a customized, full color, 40-page report. This powerful benchmarking tool can help you build a more valuable financial services business.

If you want to move your practice to the next level, become an equity builder.



**FP TRANSITIONS®**

**4900 Meadows, Suite 300 • Lake Oswego, OR 97035**  
**Tel. 800-934-3303 • Fax 503-452-4205**  
**[www.fptransitions.com](http://www.fptransitions.com)**