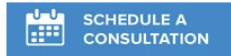


# Equity Management Solutions® (EMS™)

Managing the equity in your financial services practice is an ongoing process. Your business, your staff, and your personal goals change over time. To help manage, protect and improve your practice according to your unique goals, Equity Management Solutions® (EMS™) offers two levels of resources to support your individual business.

Every EMS™ membership includes two core benefits: a valuation and a continuity plan to monitor and protect your practice. Whether you want to manage value or actively grow your business, you can select a membership that fits your needs.

## RESOURCES



### EMS™ Essentials

**\$95/mo.**  
Annual agreement

[Learn More](#)

Fundamental business tracking and protection tools for practice owners who are looking to maximize the value of what they have or in preparation for a sale.

EMS™ Essentials membership includes:

- Annual Market Value Analysis
- Annual Continuity Plan with Updates
- Annual Coaching Call
- Priority Acquisition Notifications
- Exclusive Member Tools and Resources

### EMS™ Professional

**\$500/mo.**  
Annual agreement

[Learn More](#)

Growth tools and coaching for forward-thinking owners looking to enhance their business through a variety of strategies, including growth and acquisition recommendations.

EMS™ Professional membership includes:

- Annual Assessment of Business' Equity Value
- Annual Comprehensive Benchmarking Report
- Annual Continuity Plan with Updates
- Continuity Partner Matching
- Quarterly Coaching Call
- Basic KPI Consulting
- Acquisition Readiness Tools
- Priority Acquisition Notifications
- Annual Market Assessment of an Acquisition Target
- Unlimited Inquiries
- Exclusive Member Tools and Resources

#### CONNECT



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