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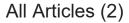
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A Lesson from the Best Family Practices

By: David Richman | March 13, 2024

Some of the most successful teams we encounter are family practices. This makes us wonder: what are the nuances of such high-functioning family teams that might be replicated in non-family practices?



Teams

There Are No Called Balls or Strikes with Succession Opportunities

By: David Richman | February 21, 2024

Recent consults on the topic of succession have highlighted a shift reflecting the demographics of our industry. Mid-career advisors are now in the driver's seat with increasing numbers of older advisors looking for successors.

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David Richman Managing Director Advisor Institute











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