Financial Advisors - Your Client's REAL Wealth Isn't in Their Portfolio - It's Still Trapped in Their Business

Global Growth Partners
M&A ADVISORY FOR THE REAL WORLD

Global M&A Bulletin

Problem: Client's Wealth Locked in Their Business - Little/No Diversification

You already know the story. Your client has built a thriving company. On paper, they're wealthy. In reality, 70-90% of their net worth is trapped inside one illiquid asset, their business. They want liquidity for retirement, estate planning, or family goals... but they're not ready to walk away. They love the business. They still want skin in the game.

This is where most financial plans hit a wall.

The old "just sell the whole company" playbook doesn't work for every business owner. When a financial advisor keeps the conversation strictly to stocks, bonds, 401ks, IRAs and portfolio allocation, something important gets left on the table. You simply can't structure a comprehensive financial plan without talking through succession planning and discussing strategies around unlocking the real net worth that's still trapped inside the client's most valuable asset, the business itself.

Many Business Owners - 70-90+% of their net worth is trapped inside one illiquid asset, their business. No diversification, little liquidity & lacking a succession planning strategy...

FOR MORE INFORMATION:

WWW.GGPUSA.COM / 704-438-9930

The M&A Advisor of Choice for Entrepreneurs, Families and Closely Held Middle Market Businesses

The right M&A advisor doesn't push a 100% sale. They design liquidity (full-to-partial) solutions that let your client:

I. Harvest meaningful cash today (often 30-60% of equity value)

II. Retain significant ownership and upside (frequently majority or substantial minority stake)

III. Participate in the next leg of growth through rollover equity

IV. Diversify their personal balance sheet while keeping the business in the family

These aren't theoretical deals. They're happening every day with recaps, strategic investments, and family-office partnerships.

Your client gets liquidity + continued upside. You stay the trusted advisor on the personal side. **Everyone wins.**

In Summary

If you're a financial advisor who wants to deliver this level of sophisticated planning to your business-owner clients, it's time to pick your M&A partner wisely.

Choose someone who:

- Specializes in full exists, partial exits and recapitalizations (creativity rules the roost)
- Understands fiduciary coordination and works as an extension of your team
- Has a proven track record of maximizing both immediate liquidity and long-term value

The best partnerships we see are exactly that — true partnerships. Global Growth Partners handles the transaction complexity so you can focus on the holistic plan.

If this resonates and you'd like to explore a collaborative relationship, reach out. Be happy to share how we structure these wins for advisors and your clients.

Let's help more business owners turn paper wealth into real freedom — without forcing them to choose between cash and upside.