



Build Success - Then Enjoy It!

Finally, an FMO that helps you build your business, grow your business and retire to enjoy the success of your business.

The insurance industry continues to grow in complexity requiring you to adjust through transition, which can take many forms. You may be just beginning to build your practice and want to develop it to welcome future changes, an established agency that is transitioning, or at a point in your career that you want to retire and have someone else take care of your client relationships. Regardless of your situation, Senior Marketing Specialists is an FMO that wants to help you build your business and enjoy your success.

To assist with your unique needs, we have developed Acquisition Pathways. This specialized division of our company will provide tools, advice, and direction. If you decide it is time to sell your practice or wish to sell only a division of it, our company is even prepared to acquire it. We will help you obtain a professional valuation, create the necessary documents, and help with all carrier communications. If you have an office and staff, we help design a plan to ensure their successful future and inclusion, and most importantly, we will develop a plan for our highly trained agents and staff to care for your clients. You can relax knowing that your clients and staff will receive the ongoing support and care they need.

Here are just a few questions we can assist with:

- How do I structure my business to prepare for transition or succession to a trusted stakeholder?
- How should I set up my carrier contracts for myself or my sub-agents?
- How do I determine the value of my block of business?
- How do I make sure my clients are cared for if I retire?

There are countless details that we can help you address. To confidentially discuss your particular situation and to find ways we may be able to help, call 1-800-689-2800 and ask for the Acquisition Pathways team or visit www.smsteam.net/acquisition-pathways



AN INTEGRITY COMPANY