NINETY-TWO PERCENT of rep-advisors recognize that it is highly or moderately risky to not have a succession plan in place, yet only half of the industry has begun to develop a succession plan.\(^1\)

Whether preparing a continuity plan for a planned succession or creating a proactive protection plan for your business, it is important for business owners to have a written plan in place to protect the value of their business.

CAMBRIDGE CAN HELP YOU IMPLEMENT YOUR EXIT STRATEGY AND THE LEGACY YOU HOPE TO LEAVE BEHIND.

Cambridge Investment Research, Inc. has several options to assist you in putting a succession plan in place:

CONTINUITY EXPRESS® AND SUCCESSION PLANNING

Continuity Express® – This smart and easy-to-implement solution is designed to help fulfill the basic need of an emergency protection plan for your financial practice. When you become part of the Cambridge family, we not only look out for you as our rep-advisor, but also your family, staff, and clients.

Don’t wait for something to happen, call today to put your succession plan in place!

Cambridge provides you with succession consultation, sample templates, matching partners, and business valuation services to assist you in developing your plan.

We try to match you with another rep-advisor with a similar business model to ensure a smooth transition when the time comes to hand your practice over to a successor.

VISIT www.joincambridge.com to listen to Founder, Chief Executive Officer and Chairman of the Board, Eric Schwartz “How I Built Forever and How You Can Too”.

Cambridge Investment Research, Inc. (Cambridge), member FINRA/SIPC, is an independent, privately owned broker-dealer with more than 2,500 independent registered representatives and over $65 billion in assets under management.

Cambridge has been ranked a fee leader among independent broker-dealers for 14 consecutive years\(^2\).

Cambridge is a seven-time winner in the Broker-Dealer of the Year annual poll\(^3\).

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\(^1\) InvestmentNews, Adviser Solutions Succession Planning Study, 2012

\(^2\) Financial Planning magazine, June “FP50”, 2001-2014