



# 2025 DISTRIBUTION AND MARKETING CONFERENCE

*Shaping Our Future*

## Securing the Future: Succession Planning for Advisors



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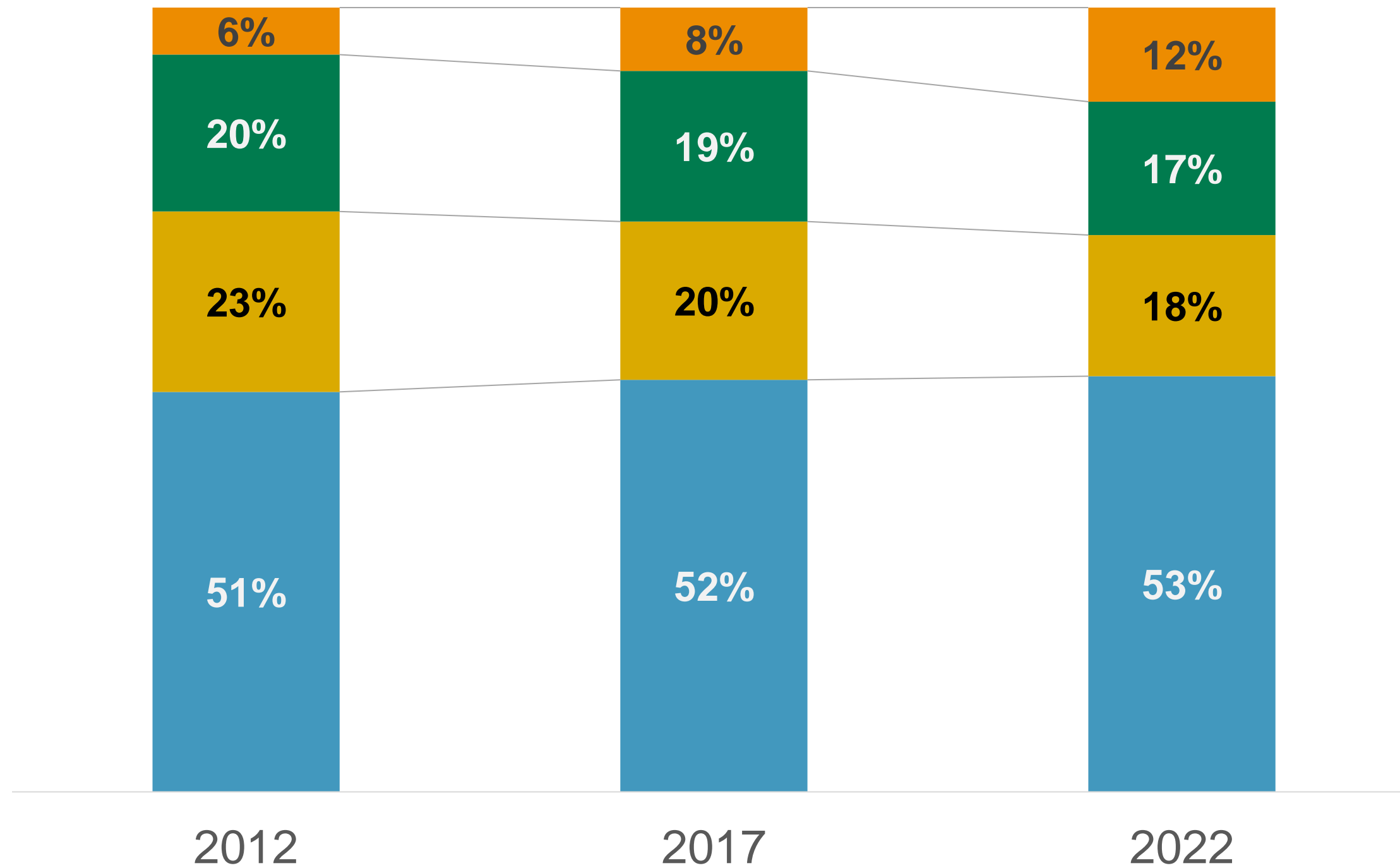
# Why Succession Planning?

- Company
- Clients
- Financial Planners



# Financial Professionals by Age Group

■ Under age 45   ■ 45 - 54   ■ 55 - 64   ■ 65 & older

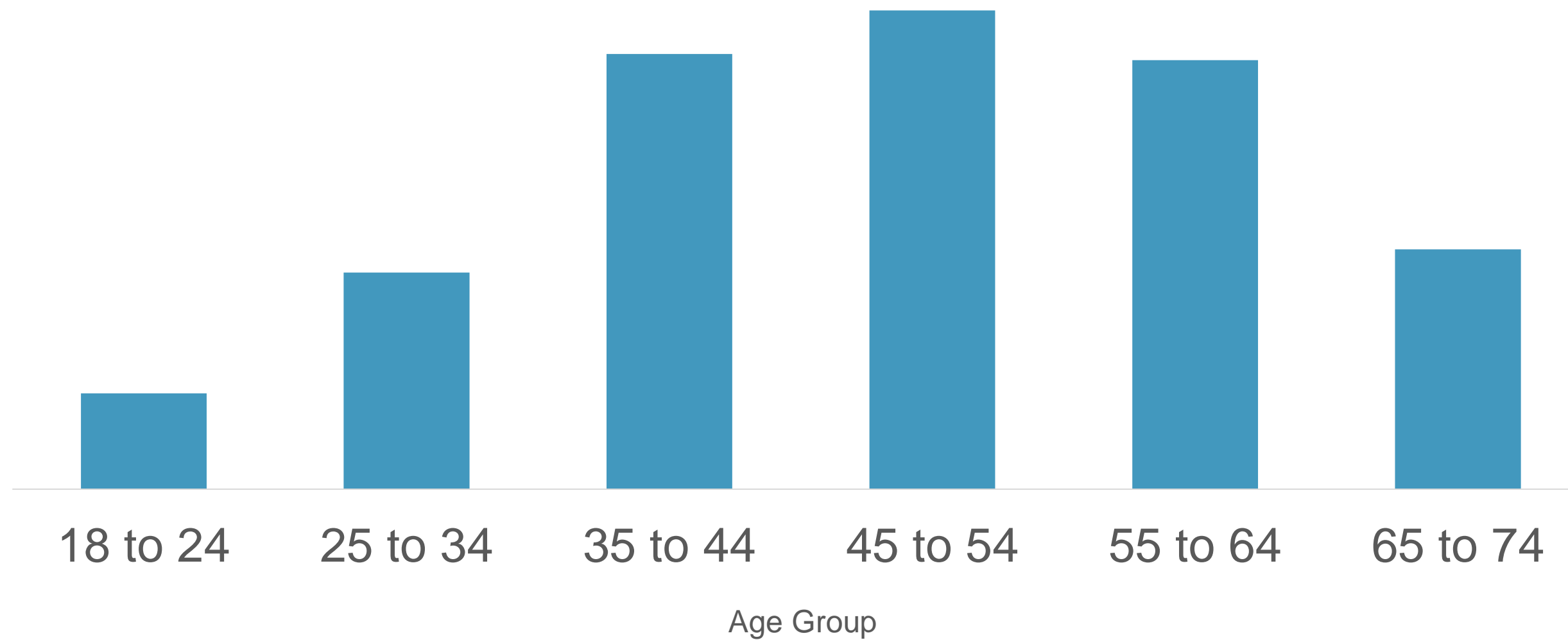


**The percent of FPs age 65 and over has doubled in the past 10 years\***

\*Not a constant group of companies and includes only FPs operating in agency-building distribution.

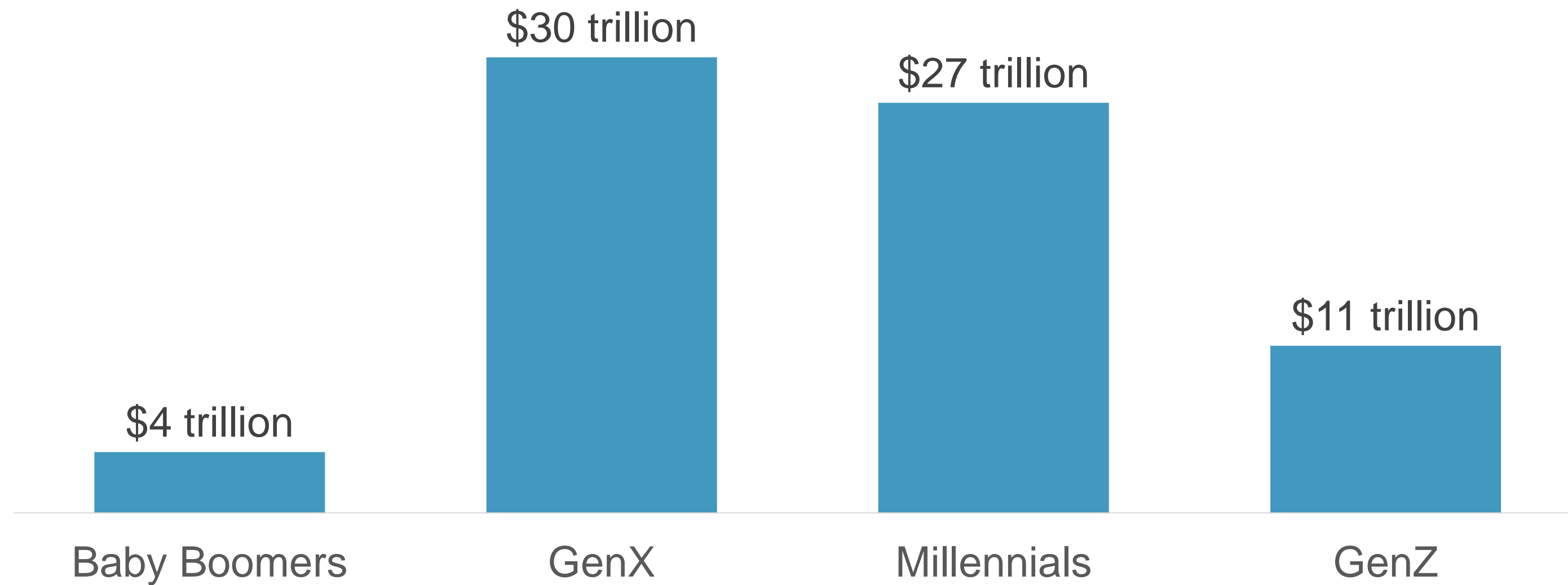
# Production by Age Group

Average Production per Financial Planner



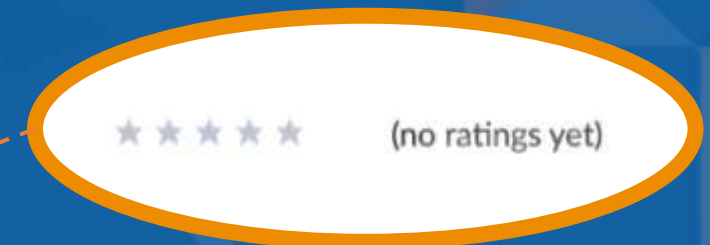
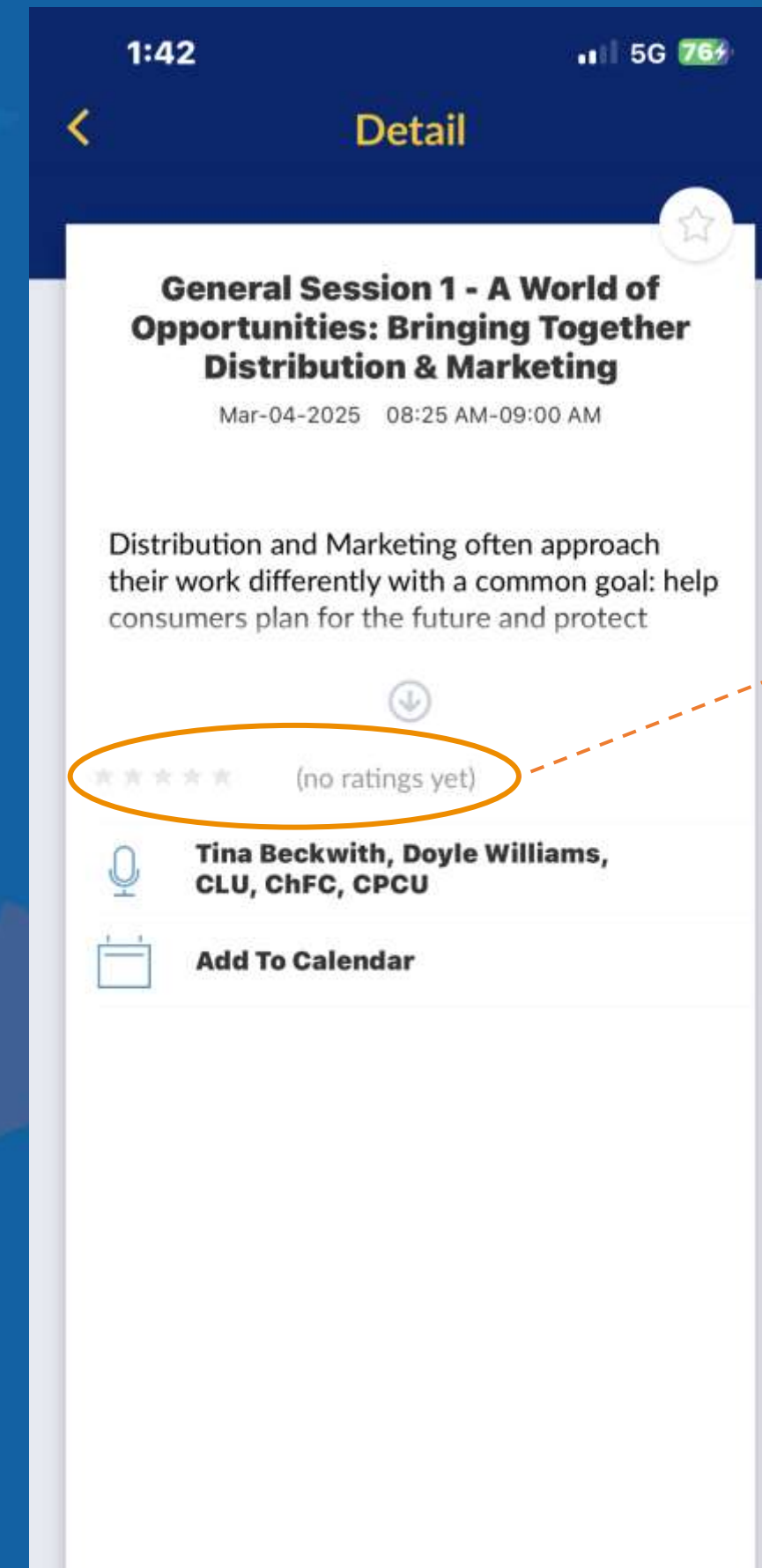
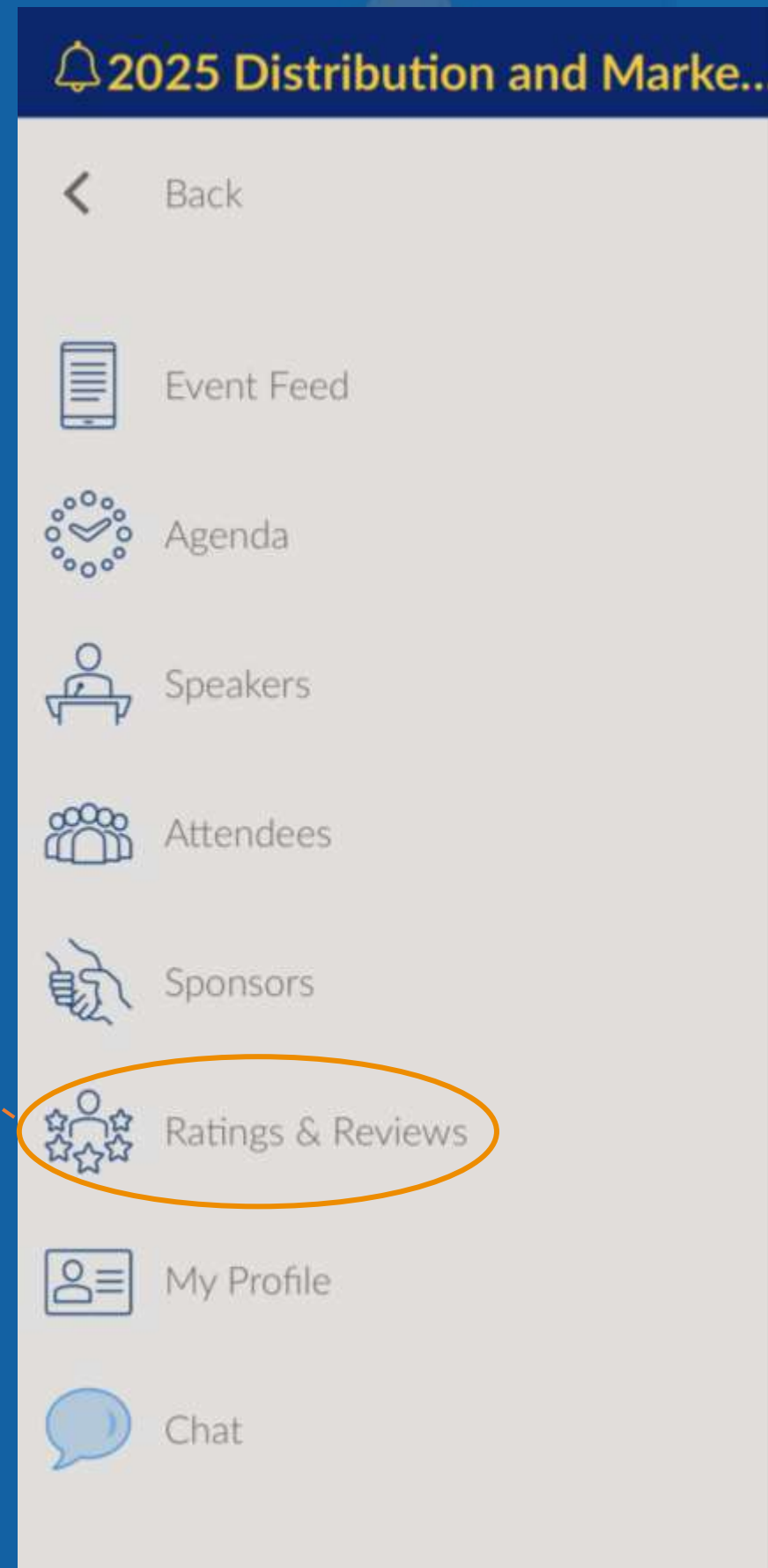
# Generational Wealth Transfer: Building on Existing Relationships

Estimated wealth to be inherited through 2045, by generation



Source: Cerulli Associates, "The Cerulli Report: U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2021."

# Please Provide Your Feedback on the Conference App





# Thank You

