

M&A PRACTICE VALUATION

Selling Your 401k Business

Undervaluing your business could mean leaving money on the table, while overvaluing could scare away potential buyers. Our valuation is another tool that can help ensure you set a fair and yet maximized price rather than a simple "rule of thumb" multiple.

Using the 2024 D.C. Advisor Practice Management Benchmarking database, representing 319 offices and \$870 billion AUM in retirement plan business, we will evaluate and benchmark the retirement plan business on five critical categories:

- 1.) 401k Business Financials and Growth History
- 2.) Plan by Plan Fee & Service Measures
- 3.) Sales & Marketing Metrics, Tools and Practices
- 4.) Client Management Strategic Tools and Resource Utilization
- 5.) Practice Operational Efficiencies, Team Structure and Compensation

Acquiring a 401k Business

To help you make a more informed decision on whether or not to acquire a 401k practice, you'll have detailed benchmarking, a comparison of overall practice growth compared to the market, staff recovery rates and best practices for evaluating the services provided, tools used and cost of serving retirement plan business.

STEP
1

The firm being evaluated spends approximately 4-6 hours gathering data and completing our proprietary benchmarking survey.

STEP
2

WinMore Plans uses the data provided to create a custom benchmarking scorecard, including readiness benchmarks and a valuation opinion.

STEP
3

You are invited to a one-hour discussion to review the results with the research team.

Results

Your official custom scorecard and valuation opinion can be completed in 3-10 business days