



How Transition Ready Is Your Practice?

Many advisors spend years building a successful business.

Far fewer spend time evaluating whether that business is prepared for its next chapter.

RATE YOUR PRACTICE (1–5)

	Growth Capacity Can your current platform support where you want to be in five years?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
	Succession Readiness Do you have a documented plan for continuity and eventual succession?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
	Team Alignment Is your team aligned around future goals and responsibilities?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
	Client Portability How confident are you that key client relationships would remain intact through a transition?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
	Operational Scalability Can your systems, processes, and technology support future growth?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

YOUR SCORE (ADD YOUR TOTAL)

21 – 25

READY FOR OPTIONABILITY

Your practice is well-positioned for future growth and strategic opportunities.

16 – 20

BUILDING MOMENTUM

You have a strong foundation, but several areas may benefit from additional planning.

BELOW 16

TIME TO EVALUATE

Early planning today can create more options tomorrow.



The most successful transitions don't start with paperwork. They start with honest evaluation.

— Jason Kuehn
President & Founder



We're Here to Help.

At Arlington Group, we help advisors evaluate options, strengthen readiness, and navigate transitions with clarity and confidence.



Let's start a conversation.

Every practice is unique. We'd love to learn more about yours.



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