

Insider Insight

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The Best Succession Plans Start Earlier Than You Think

Building a valuable business and building a transition ready business are not always the same thing.

Many advisors assume succession planning begins when retirement becomes real. In reality, the strongest succession outcomes are often built years before they are needed.

A common misconception in today's market is that buyers will simply appear when the time is right. But increasingly, buyers are evaluating much more than AUM.

They are looking at the long term viability of a business, the continuity of client relationships, leadership depth, operational maturity, and whether the next chapter of the firm has been thoughtfully considered.

Because a successful business financially does not always translate into a seamless transition strategy.

At Arlington Group, we believe succession planning should not begin when urgency arrives. It should begin long before decisions become immediate.

The strongest succession strategies are often supported through thoughtful recruiting, internal alignment, leadership continuity, and intentional planning around what comes next.

In many cases, succession is not simply about stepping away. It is about building a business that can continue to thrive, retain clients, and preserve culture through change.



Watchouts Advisors Should Consider

1. Waiting Too Long
2. No Internal Bench Strength
3. Recruiting Too Late
4. Confusing Valuation with Readiness

"Succession is not something advisors prepare for at the end. The strongest outcomes come from planning years in advance through structure, recruiting, and continuity."

– Jason Kuehn, President & Founder