

Insider Insight

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4 Questions that Drive a Transition Decision

There is no shortage of information available to advisors considering a move.

Platforms are compared. Economics are modeled. Growth projections are outlined. And yet, even with all of that, many advisors still feel stuck in the decision.

Not because they lack options. But because they are trying to answer everything at once. Over time, one pattern becomes clear.

The advisors who move with confidence are not the ones with the most information. They are the ones asking the right questions in the right order.

Because a transition is not a single decision. It is a sequence of decisions that build on each other.

And when that sequence is unclear, progress stalls.



The 4 Questions that Actually Matter

- What **problem** are we solving?
- What does **growth** actually look like over the next five years?
- How will this **impact** clients?
- What infrastructure **supports** a clean move?

The most successful transitions are not driven by urgency. They are driven by structure.

By slowing down the evaluation process, advisors create the conditions to move forward with intention, not uncertainty.

"Confidence in a transition does not come from having more options. It comes from having a clear framework to evaluate them."

- Jason Kuehn, President and Founder