Business Continuity Planning

IF SOMETHING HAPPENED TO YOU, WHAT WOULD HAPPEN TO YOUR CLIENTS?

Eclectic Associates offers business continuity planning to financial advisors in Southern California:

- Contingency buy/sell agreements in case of owner death or disability
- Business sale/merger/retirement planning

Highlights of Eclectic's business:

- Founded in 1984 as a fee-only financial planning and investment management firm
- Owned and operated in Northern Orange County, in the same location since we were founded
- More than 730 clients and over $750 million under management
- Strong leadership team, with 50+ combined years in the business
- Deep ties to NAPFA and FPA, including two FPA chapter past presidents
- Firm has eight advisors (all CFP® professionals), plus a six-person support staff
- Three Chartered Financial Analyst® (CFA®) charterholders, plus two MBAs

Eclectic's mission has always been to help our clients achieve peace of mind about their money and their future. We would now like to expand this mission to include helping a few select advisors in Southern California achieve peace of mind about their business and their retirement future.

Please give us a call to discuss how we can help. We can tell you our stories of a firm we bought, buy/sell contingency agreements we have in place, and our own internal succession plan, which now includes the third generation of owners.

Let's talk about the ways we might be able to work together.

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You have worked hard to plan your clients' future, but now it's time to plan your own.

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