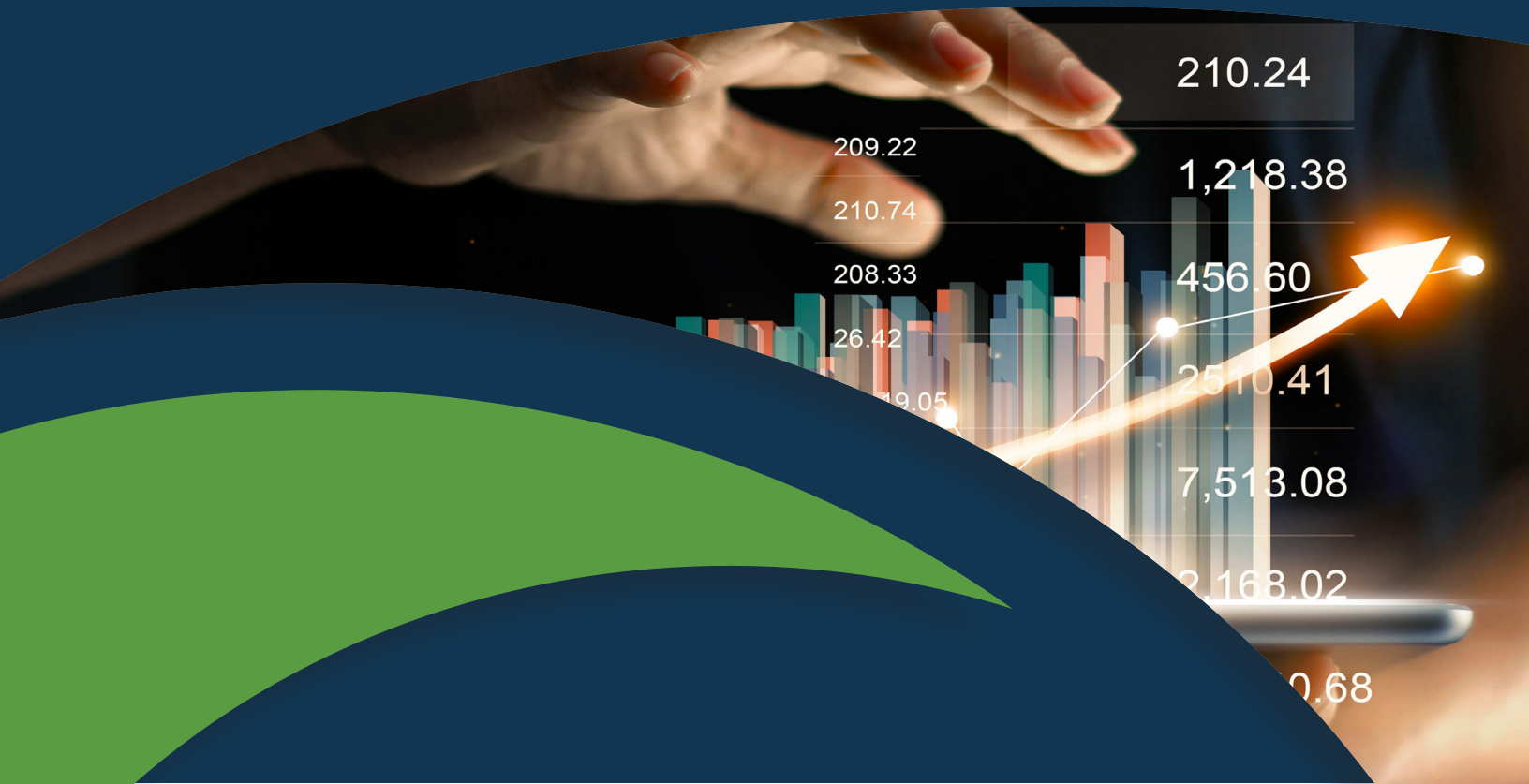


Scaling Up Acquisitions

One Firm's Path To Rapid Growth




PPCLOAN®



Like many firms, Leslie Global Wealth eased into the realm of acquisitions. They started with two small acquisitions in 2011, which were financed with a seller note for 75% of the total purchase price. This arrangement allowed them to proceed with each of the acquisitions without raising outside capital. In 2015, the firm was presented with an opportunity to buy a practice that was larger than their own practice at the time. However, unlike their first acquisitions where the seller financed the deal, this seller wanted 100% of the money up front. This forced founder Barry Leslie to seek out other options to finance the deal.

The Solution

As luck would have it, an off-hand conversation with a fellow LPL advisor guided Leslie to a solution. As Leslie explains, his colleague “gave me Dustin Mangone’s card and said call them. They will help you out.” Leslie followed his colleague’s advice and contacted Mangone. “He did a preliminary underwriting estimate based on my book of business,” says Leslie. “With that they were able to give me the confidence quickly and easily that they could fund the deal.”



Funding Growth

The Process

Looking back, Leslie remarks how the whole process with PPC LOAN “seemed almost too easy. They made it pretty easy from start to finish.” Despite challenges collecting information from the seller, PPC LOAN was able to work with Leslie and LPL to structure a deal that worked for all parties. PPC LOAN funded the bulk of the loan, while LPL funded a small portion of the deal. The transaction more than doubled the size of the practice.

Back to Back Deals

In 2018, Leslie had another opportunity to acquire a practice. Once again he worked with PPC LOAN to finance the deal. As Leslie and the team approached closing, another opportunity developed. Leslie reached out to PPC LOAN to see what they could do. “They came up with a program that made it easy for me to wrap up those two acquisitions into one loan.” Leslie adds that when it was all said and done, PPC LOAN was able to provide “close to 100% financing for both acquisitions.” The two acquisitions once again doubled the size of Leslie’s practice.

Consultative Approach

Prior to receiving the referral to PPC LOAN, Leslie didn’t believe he had many options. Since doing his first deal with PPC LOAN, Leslie has made it a habit to contact the team any time he is considering an acquisition. “In March I was presented with an opportunity for a practice that had \$120MM in AUM.” Leslie explains, “I engaged them early to find out if they could get it done before I went through the process. They were honest and told me it would be tight.” Leslie asked about another deal the year prior and again received an honest assessment of the deal and his ability to carry the loan obligation.

“They made it pretty easy from start to finish.”

An Honest Partner Looking Out For Your Best Interest

An Experienced Point of View

"It really helps having a consultant in my back pocket," says Leslie about PPC LOAN. "They help me understand what's in my wheelhouse and what is not, what's realistic, and what I can get done on my own." Having that knowledge is helping Leslie not only evaluate acquisitions but also the long-term trajectory of his firm. "What I'm learning is that there is only so much I can do on my own." Leslie is looking at many options, but he knows one thing for sure, "I absolutely want to do more acquisitions. I'm always keeping an eye open and when the right one comes along I will be ready."

"PPC LOAN's expertise and experience really comes across. They know what they're doing."

Make That Call

When asked what advice he would give to another advisor, Leslie says, "You gotta call PPC LOAN. There aren't many lenders that specialize in our industry. PPC LOAN's expertise and experience really comes across. They know what they're doing."



Exponential Growth

Thanks to the acquisitions they have made in the last nine years, Leslie Global Wealth has more than quadrupled the size of their business. The team has also grown, allowing them to serve a larger number of high net worth clients and continue to scale their practice. To learn more about Leslie Global Wealth you can visit <http://www.leslieglobalwealth.com>.

Looking for an Acquisition Loan?

Planning to expand your financial advisory firm is an exciting time. You realize that your business is primed for growth, and you can accelerate that process by acquiring another firm. But when you need to address acquisition finance, where do you go to find a loan that's right for your needs?

That's where PPC LOAN can help. **Growth Loans™** enable investment advisory firms like yours to secure financing tailored to their specific needs. Our investment advisor funding experts have in-depth experience helping advisors prosper with business acquisition loans attuned to their goals.

We work with you to meet your needs by offering competitive rates and flexible terms that help protect your financial health while you grow your business. We customize every business acquisition loan to suit your financial priorities. And that means not only the best deal but unmatched support, too. Here is a snapshot of the benefits that come with a business acquisition loan with PPC LOAN:

Reasonable rates and flexible loan terms

We offer rates that aren't a burden to your firm paired with flexible loan terms designed to meet the unique needs of your firm and the deal.

Simple three-step process

We are committed to making the loan application process as quick and seamless as possible, making it easier for you to get the right loan.

Comprehensive support

Whether you're dealing with our analysts, our closing team, or our customer concierge team, you'll have unmatched guidance and support.

Learn more and apply by visiting

<https://investment-advisors.ppcloan.com/service-offered/acquisition/>

About PPC LOAN

PPC LOAN has been serving financial advisors since 2007. We offer competitive rates and flexible financing for a variety of needs. We are committed to your firm's success, which is why our specialists ensure the quality of your financing option is second-to-none. Transparency underpins every interaction you have with PPC LOAN. We're upfront with you about any concerns or issues that might emerge, because we value the trust you place in us. Let us be your lending partner and help your practice grow.



Contact us today to learn more. | www.ppcloan.com | 800.456.2779