

Speaking Topics:

Rick Wilkens, CPA, CVA, Founder & Owner of Elevate CPA Group

How Much is My RIA Firm Worth?

Do you know how much your RIA firm is worth? Many firm owners don't think about their firm's value every day or even every year. Often, the question comes up only ahead of a sale or owner transition. But knowing your firm's value can actually help you unlock powerful opportunities for growth. In this presentation, Rick will break down the importance of business valuations and share:

- Why it's important to know the value of your firm
- How to look beyond the numbers of a business valuation
- The best KPIs to track and how to interpret
- How to grow your firm with crystal clear numbers you can trust

Elevate Your RIA Firm Transition Process

Buying or selling an RIA firm is a complicated, stressful and exciting process! The fine details of a successful RIA purchase or sale go well beyond dollars and cents. Elevate CPA Group has helped several RIA firms successfully complete the process. In this presentation, the Elevate team steers you clear of pitfalls and towards success! The presentation includes:

What You Need to Know About Preparing to Sell Your RIA Firm

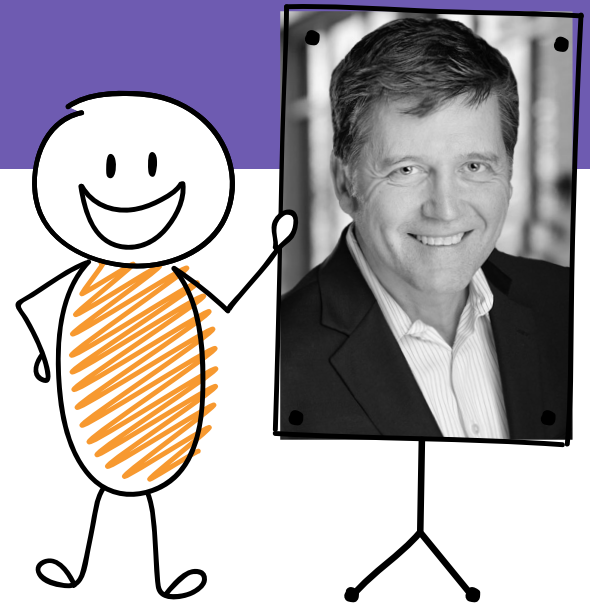
- Setting expectations
- Keeping top talent
- Business valuation

What You Need to Know About Preparing to Buy an RIA Firm

- Setting expectations
- Know your numbers
- Highest and best use of you

The Secret Sauce: How to Successfully Grow Your RIA Firm from Industry Experts

There is a reason you get your eyes checked by an eye doctor and not a dentist. It's the same reason that you trust industry experts with your RIA firms financials, tax planning, KPI setting and more – they know what they are doing! In this presentation, Elevate CPA Group provides a series of case studies to illustrate how they have taken RIA firms hunger for growth and turned it into clear actionable steps that lead to success.



Rick Wilkens, CPA, CVA

Founder and Owner

As a founding partner of Elevate, Rick manages the growth and success of RIA firms while meeting their accounting, tax, and valuation needs. For him, it's a role that comes naturally. Rick has helped hundreds of businesses grow since starting out as a CPA in 1986, and has spent the last 10-plus years serving clients within the financial services space.

Rick is known for being a good listener. He seeks to understand all aspects of his clients' businesses so he can coordinate a strategic growth plan. Above all else, Rick lives for seeing a plan come together—and knowing his clients will sleep more soundly at night.

Rick graduated from DePaul University as a Strobel Scholar and is an active member of the AIPCA, Illinois CPA Society, and the National Association of Certified Valuators and Analysts.

Born and raised in Chicago, Rick continues to call the Windy City home and even serves on the board of his high school alma mater, St. Patrick High School. When he's not in the middle of a house project, he's spending time with his family or on the golf course.

To Request Rick
as a Speaker:



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