The First 90 Days: What Happens After the Transition

A structured, post-close framework ensuring client trust, team stability, and operational continuity.

DAYS 1–30 Stabilize

PHASE 1: RELATIONSHIP CONTINUITY

- Personal introductions by the retiring advisor
- Team communication and role clarity
- No changes to client experience without consent
- Joint client meetings for top relationships
- Access to AHP resources and service model

DAYS 31–60 Integrate

PHASE 2: OPERATIONAL ALIGNMENT

- Systematic client outreach
- Technology and reporting transition
- Feedback loop with retiring advisor
- Service model alignment
- Team training and onboarding

DAYS 61–90 Optimize

PHASE 3: LONG-TERM EXECUTION

- Full service model in place
- Retiring advisor steps back to agreed level
- Long-term relationship plan
- Client satisfaction check-ins
- Transition review and adjustments

Every transition is different. This is the framework, not a rigid script. The retiring advisor's involvement is agreed upon in advance.

Request a Confidential Successor Fit Review

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