

ALPHA FINANCIAL PARTNERS

LEADER IN :

Business Succession Planning

Alpha Financial Partners, LLC is a fiduciary-based Registered Investment Advisory firm in Lexington that focuses on business owners and their employees; offering an array of group benefits, wealth management, insurance, estate and financial planning services. According to the Exit Planning Institute's®2013 State of Owner Readiness Survey - 76% of Boomer business owners plan to transition their business over the next decade. As more of Alpha's clients approach this milestone, they're asking "What should I do with this business that I have spent a lifetime building?"

Marc Cobane, one of the firm's partners, became one of the Commonwealth's few Certified Exit Planning Advisors® in 2019. During his CEPA® training at the Chicago Booth School of Business, he met insurance agent Kerry Pulliam. They decided to collaborate to help business owners plan for successful transitions.

Having both worked with Jamie Traugher of Traugher Wealth Law on complex business transactions, they agreed that he would be the perfect addition to their team as an attorney who understood complex entity, trust and tax structures. Combining their expertise, they can ensure that your business takes the proper steps towards a successful transition, whether that be a management buy-out or ESOP, an external sale, or transferring the business to the next generation.

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Alpha Financial Partners LLC is a registered investment advisor.

