

Merger Maximizer Readiness Assessment™

*Know Where You Stand.
Decide What's Next.*



— Est. 2006 —

Name:

Date:

About ClientWise LLC

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals.

We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results.

Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you **get clear, get focused, and get results.**

About This Assessment

The wealth management industry is in the midst of an extraordinary consolidation. Mergers and acquisitions are happening at a pace and scale unlike anything this profession has seen before. Firms are combining, practices are being absorbed, and advisors who once thought M&A had nothing to do with them are finding it knocking at their door — as a buyer, a seller, or both.

And yet, despite all this activity, most of the people involved are underprepared. Not financially. Not legally. Those boxes usually get checked. What gets overlooked, consistently, almost universally, is everything else. The purpose behind the transaction. The leadership dynamics between principals. The operational complexity of merging two distinct firms. The trust that clients and teams have built over decades, and what it truly takes to transfer that trust to something new. This assessment was created to address that.

The ClientWise Merger Maximizer™ Readiness Assessment is not a coaching program. It is a mirror. It is a structured self-assessment built to give you honest, clear visibility into where you are — right now — in your M&A journey. Not where you hope to be. Not where you think you should be. Where you actually are. The goal is awareness. The goal is learning. And the goal is to guide you from where you are now to more deliberate, purposeful action, because in M&A, the quality of your preparation always determines the quality of your results.

What This Assessment Is Not

This assessment is not The ClientWise Merger Maximizer™ Coaching Program. It is the starting point for it.

The Merger Maximizer™ is a 12 to 16-week structured coaching program that guides the principals of a potential merger navigate every dimension of what makes a transaction truly succeed — from purpose and impact, to leadership alignment, to operational integration, to the building and transferring of trust, to final business alignment and the decision to move forward. It is intensive, guided, and based on twenty years of ClientWise experience coaching advisory firms through some of the most complex transactions in the industry. **This assessment exists to answer one question first:**

Where are you — and what do you need?

Three Profiles, One Destination

Depending on where you are and what you need, the Merger Maximizer™ will serve you differently, but it will serve you powerfully regardless of where you are in your journey.

Before starting the assessment, choose one of the three profiles below that best reflects your current relationship with M&A. Each profile has its own version of the assessment — same structure, same rigor, written specifically for your current situation.



THE EXPLORER

You are curious about M&A, and possibly considering M&A for the first time, or seriously for the first time. You may not have decided whether a merger or acquisition is right for you at all. This assessment will help you think it through with clarity and honesty, and give you a foundation for the conversations that need to happen before any decision is made.

What the complete Merger Maximizer™ Coaching Program provides: A structured, coach-guided process that helps you and potential partners build true alignment on purpose, leadership, operations, and trust before you ever get to legal and financial. For first-timers, this alignment work is the difference between a merger that transforms your firm and one that disrupts it.



THE DEALMAKER

You have engaged in, explored, or completed between one and five transactions. You have real experience and real lessons. Some of what you've done has worked. Some of it hasn't worked as well as you hoped. This assessment will help you see clearly what you've learned, where your process still has gaps, and how to bring more discipline and intention to what you do next.

What the complete Merger Maximizer™ Coaching Program provides you and others: A sharper, more rigorous process for the dimensions of M&A that experience alone doesn't solve — the human, relational, and organizational work that separates transactions that close from transactions that thrive. For dealmakers, this is where good becomes great.

Notes:



THE ARCHITECT

You have completed five or more transactions. M&A is a core part of how you grow your firm. You have a process, but you also know that even experienced acquirers leave value on the table, especially in the non-valuation dimensions of a deal. This assessment will challenge you to look honestly at whether your M&A engine is as sophisticated as the ambition behind it.

What the complete Merger Maximizer™ Program provides you and others: Something most serial acquirers have never considered — a structured framework to offer the teams you are acquiring. For a seller or merger partner engaging in their first or early transaction, working through the Merger Maximizer™ Coaching Program alongside you is extraordinarily valuable. It creates alignment faster, reduces integration friction, and protects the trust with clients and teams that makes the combined firm worth building. The Architect who brings this to the table is not just a better acquirer. They are a more compelling one.

Where You Are Now, and What You Need Next

Select your profile above and complete only that version of the assessment on the following pages. Rate each of the 25 statements honestly on a scale of 1 to 4. Do not mark 4 unless the statement is fully and completely true for you today.

Every score is an invitation. The only wrong answer is the one that stops you from doing the work.

Version 1: THE EXPLORER

Is M&A Right for Me?



Rate each statement below: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

Reminder: Do not mark 4 unless the statement is fully and completely true for you today.

Section A | Purpose & Personal Clarity

1	I have a clear vision for what I want my practice and my life to look like five to ten years from now.	①	②	③	④
2	I understand what a merger or acquisition could give me — personally and professionally — that I cannot build on my own.	①	②	③	④
3	I have thought seriously about whether inorganic growth through M&A aligns with what I want my practice to become.	①	②	③	④
4	I know what legacy I want to leave through my work, and I have considered whether M&A advances or complicates that legacy.	①	②	③	④
5	I have considered the key people in my world, such as clients, team, family, and thought through what a merger would mean for each of them.	①	②	③	④

Section B | Leadership & Partnership Readiness

1	I understand how my leadership role would need to change if I merged with or acquired another team.	①	②	③	④
2	I have thought about what kind of partner or principal I would need alongside me to make a merged team work.	①	②	③	④
3	I am honest with myself about my strengths and limitations as a leader, and how a merger would test both.	①	②	③	④
4	I have considered what a healthy post-merger working relationship with another principal would need to look like for me.	①	②	③	④
5	I understand how a merger could affect — positively or negatively — my succession planning and the long-term future of my practice.	①	②	③	④

Section C | Operational Readiness

1	I have an honest picture of where my current operations are strong and where they are vulnerable going into a potential merger.	①	②	③	④
2	I understand the complexity involved in combining two firms — teams, systems, processes, pricing, and compensation — and I am prepared to engage with that complexity.	①	②	③	④
3	I have thought about what my firm's brand means to my clients, and what it would take to merge that brand with another without losing what matters.	①	②	③	④
4	I am confident my current team is strong enough to absorb the change and uncertainty that a merger would bring.	①	②	③	④
5	I believe my clients would remain with me, and be well-served through the transition a merger would require.	①	②	③	④

Section D | Trust — Building It, Transferring It

1	I understand that client trust is tied to me personally, and I have thought about what it would take to transfer that trust to a merged firm.	①	②	③	④
2	I have thought about how I would introduce a merger to my clients in a way that strengthens rather than threatens their confidence in me.	①	②	③	④
3	I understand that my team's loyalty is tied to me, and I have thought about what it would take to earn their trust in a new team and leadership structure.	①	②	③	④
4	I am prepared to be transparent with clients, team members, and referral sources about a merger at the right time and in the right way.	①	②	③	④
5	I have considered what could go wrong with trust during a merger, and whether I am prepared to manage those risks.	①	②	③	④

Section E | Decision Readiness

1	I am exploring M&A from a position of strength, not because I feel pressured, cornered, or out of options.	①	②	③	④
2	I have honestly compared what M&A could give me against what continuing to grow organically could give me, and I am open to where that comparison leads.	①	②	③	④
3	I am willing to do the deep planning work — beyond valuation — that a successful merger actually requires.	①	②	③	④
4	I do not have significant unresolved concerns about M&A that I have not yet been willing to examine honestly.	①	②	③	④
5	I believe that if the right opportunity and the right partner emerged, I would be genuinely ready to explore this path seriously.	①	②	③	④

Notes:

THE EXPLORER: What Your Score Is Telling You	
Total Score	What it means
85 – 100	Strong Curiosity, Strong Foundation. You have done real thinking about M&A and your instincts are well-formed. A conversation with a ClientWise coach will help you sharpen your criteria and determine whether the timing is right to move forward.
65 – 84	Real Interest, Some Gaps. You are drawn to the idea but there are important questions you haven't fully worked through yet. That's exactly what the exploration process is for, and a compelling reason to go deeper with a coach.
40 – 64	Early Exploration. M&A may or may not be right for you. What's clear is that more thinking is needed before you can know. A ClientWise coach can help you work through the questions that will bring you to clarity.
Below 40	Not Yet Ready to Explore. This isn't a verdict — it's information. Before M&A can be seriously considered, there is foundational work to do on vision, leadership, and firm readiness. That work is worth doing regardless of whether a merger ever happens.

Notes:

3 Is your interest in M&A driven by something you are moving toward, or something you are moving away from? How does your answer shape the kind of transaction you should be considering?

4 What is the one conversation you have been avoiding — with yourself or with someone else — that would give you the most clarity about whether this is the right path for you?

Notes:

- 5 If a ClientWise coach sat across from you today and asked “Are you ready?” — what would you say, and what would you most need help working through to get there?

Version 2: THE DEALMAKER

Am I Doing This Better Than Before?



Rate each statement below: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

Reminder: Do not mark 4 unless the statement is fully and completely true for you today.

Section A | Purpose & Personal Clarity

1	I am clear about why I am pursuing this transaction, and my reasons go beyond financial gain to include what I am building long-term.	①	②	③	④
2	I have learned from my prior transactions and I am applying those lessons deliberately to how I am approaching this one.	①	②	③	④
3	I have honestly evaluated whether my prior transactions delivered what I expected, and I understand why they did or didn't.	①	②	③	④
4	I know what I want this merger to give me personally and professionally that my prior transactions did not fully deliver.	①	②	③	④
5	I have considered the impact of this transaction on my key stakeholders, clients, team, family, and I have a clear picture of what I want for each of them.	①	②	③	④

Section B | Leadership & Partnership Alignment

1	All principals are aligned on their post-merger roles, responsibilities, and authority, and those conversations have happened openly and honestly.	①	②	③	④
2	I have been honest about how my leadership will need to shift as a result of this merger, and I am prepared to make those shifts.	①	②	③	④
3	The principals have addressed their different leadership styles and philosophies directly, not assumed they will work themselves out.	①	②	③	④
4	I have designed — not just hoped for — the kind of working relationship I want with the other principal(s) after this transaction closes.	①	②	③	④
5	The principals have discussed how this merger affects each of their succession plans, and there is alignment on what that looks like.	①	②	③	④

Section C | Operational Readiness

1	I have a realistic picture of the operational complexity this merger will create, and I am not underestimating it based on past experience.	①	②	③	④
2	There is a concrete plan for integrating teams, systems, processes, pricing, and compensation, not just an intention to figure it out.	①	②	③	④
3	I have learned from past integration challenges and I am doing something specifically different this time as a result.	①	②	③	④
4	The principals are aligned on how the brands will be merged, and the plan respects the trust that clients have placed in both.	①	②	③	④
5	I am confident that clients from both teams will be fully and continuously served throughout this transition, not just protected on paper.	①	②	③	④

Section D | Trust — Building It, Transferring It

1	I have a clear and specific plan for transferring client trust from my personal brand to the merged practice, not just a general intention to communicate well.	①	②	③	④
2	I have identified the key messages needed to introduce the merged practice to clients and referral sources in a way that deepens rather than disrupts those relationships.	①	②	③	④
3	I have honestly assessed what my team members are worried about, and I have a plan to address those concerns directly rather than hoping they resolve on their own.	①	②	③	④
4	There is a complete and timed communication plan for the merger, not a list of things we plan to figure out as we go.	①	②	③	④
5	I have learned from how trust broke down — with clients, team, or partners — in prior transactions and I am doing something specifically different this time.	①	②	③	④

Section E | Decision Readiness

1	I know this merger will meet the needs of all principals — not just financially but personally and professionally — and that belief is based on real conversation, not assumption.	①	②	③	④
2	I am clear about how I want this merger structured and I am prepared to move that conversation forward decisively.	①	②	③	④
3	There are no significant concerns I am holding back that could undermine this merger if left unaddressed.	①	②	③	④
4	I am doing the deep planning work — beyond valuation — that I know from experience makes the real difference between a merger that works and one that doesn't.	①	②	③	④
5	Looking at my prior transactions honestly, I believe this one has the profile to be my best, and I am treating it accordingly.	①	②	③	④

Notes:

THE DEALMAKER: What Your Score Is Telling You	
Total Score	What it means
85 – 100	Strong Readiness. Your experience is working for you, not against you. The Merger Maximizer™ will formalize and deepen the alignment you've already begun building, and give this transaction the strongest possible foundation.
65 – 84	Solid Foundation, Notable Gaps. You know enough to know what you don't know, and that self-awareness is valuable. The Merger Maximizer™ will surface the areas where past patterns could repeat and help you close those gaps before they become problems.
40 – 64	Experience Without Full Alignment. You've done deals, but this one has dimensions that aren't yet resolved. Proceeding without closing those gaps carries real risk. The Merger Maximizer™ is where that work gets done.
Below 40	Pause Before Proceeding. Your experience may be creating confidence that the scores don't yet support. This is important information, and exactly the kind of honest signal the Merger Maximizer™ process is designed to surface and address.

Notes:

- 5 If you engaged the Merger Maximizer™ for this transaction and it worked exactly as designed, what would be different about the outcome, and what would that be worth to you?

Version 3: THE ARCHITECT

Is My M&A Engine As Good As I Think It Is?



Rate each statement below: 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

Reminder: Do not mark 4 unless the statement is fully and completely true for you today.

Section A | Purpose & Strategic Clarity

1	My M&A strategy is clearly defined — I know exactly what I am looking for in a target, why, and how each transaction advances my firm’s long-term vision.	①	②	③	④
2	I can distinguish between my best transactions and my weakest ones, and I know specifically what made the difference.	①	②	③	④
3	My M&A criteria have evolved meaningfully since my first transaction, and that evolution reflects real learning, not just accumulated experience.	①	②	③	④
4	I am pursuing this transaction because it fits my strategic profile, not because it was available, convenient, or good enough.	①	②	③	④
5	I have a clear picture of what I want my practice to look like in five to ten years, and my M&A activity is deliberately engineered to produce that outcome.	①	②	③	④

Section B | Leadership & Cultural Alignment

1	I have a rigorous process for evaluating leadership alignment, not just capability, before a transaction closes.	①	②	③	④
2	I have a clear and honest picture of how my own leadership style affects the success of my integrations, and I am actively working on what needs to improve.	①	②	③	④
3	The principals in this transaction have gone beyond surface-level alignment and have addressed the harder conversations about roles, authority, and operating philosophy.	①	②	③	④
4	I evaluate cultural fit with the same rigor I apply to financial fit, and I have walked away from deals that didn’t pass that test.	①	②	③	④
5	My track record on post-merger succession planning, for myself and for the teams I acquire, is something I am genuinely proud of.	①	②	③	④

Section C | Integration Excellence

1	I have a documented, repeatable integration process — not a general approach that I reconstruct from memory each time.	①	②	③	④
2	I know exactly where in the integration process my deals most often break down, and I have built specific solutions to address those pressure points.	①	②	③	④
3	My approach to integrating teams, not just systems and operations, has become more sophisticated with each transaction.	①	②	③	④
4	The brand integration work in my transactions has been handled strategically, not just cosmetically — and clients have experienced the difference.	①	②	③	④
5	I measure integration success with specific outcomes — not just the absence of visible problems.	①	②	③	④

Section D | Trust at Scale

1	I have a proven methodology for transferring client trust at scale, one that protects relationships and reduces attrition during the transition.	①	②	③	④
2	My communication strategy for mergers is sophisticated, timed, and tailored, not a generic announcement followed by a hope that clients will stay.	①	②	③	④
3	I have cracked the challenge of earning team trust quickly in newly merged practice, and I can describe specifically how I do it.	①	②	③	④
4	I have data — not just impressions — on client retention and satisfaction following my transactions.	①	②	③	④
5	The referral sources of the practices I acquire remain engaged and productive after the merger closes, and I have a specific strategy for making that happen.	①	②	③	④

Section E | Strategic Decision Readiness

1	I am honest with myself about which of my transactions truly exceeded expectations, not just closed successfully.	①	②	③	④
2	My current M&A process is the most disciplined and thorough it has ever been, and I can point to specific improvements I've made over time.	①	②	③	④
3	I do not have blind spots in my M&A approach that experienced advisors or coaches would identify — or if I do, I am actively working to surface and address them.	①	②	③	④
4	I invest as much energy in the non-valuation work of a merger as I do in the financial and legal dimensions — because I know that's where deals ultimately succeed or fail.	①	②	③	④
5	I am building a practice through M&A that will outlast me, and every transaction I do is making that practice stronger, not just bigger.	①	②	③	④

Notes:

THE ARCHITECT: What Your Score Is Telling You	
Total Score	What it means
85 – 100	High Sophistication. Your M&A engine is well-developed. The Merger Maximizer™ will sharpen your process further, and give you a powerful framework to bring to the firms you are acquiring, creating alignment and reducing integration risk from the start.
65 – 84	Strong Experience, Selective Gaps. You’ve built real capability, and there are specific areas where your process has room to grow. The Merger Maximizer™ will help you identify and close those gaps before they compound across future transactions.
40 – 64	Volume Without Full Mastery. You’ve done the deals. The question is whether the outcomes have matched the ambition. The Merger Maximizer™ is designed to close the gap between activity and excellence, and to make each future transaction measurably better.
Below 40	Time to Rebuild the Engine. Doing more deals with an underperforming process produces more of the same outcomes. The Merger Maximizer™ offers a structured reset, and the opportunity to make every future transaction significantly more powerful.

Notes:

3 Where in your M&A process are you still relying on instinct when you should be relying on a system, and what is that costing you in time, energy, and outcomes?

4 How do you currently evaluate the non-valuation dimensions of a potential acquisition — leadership character, cultural alignment, client trust dynamics — and how rigorous is that evaluation compared to your financial due diligence?

Notes:

- 5 What would your most successful transaction look like if you could do it again with everything you know now, and how the readiness assessment you just completed shows you where you stand.

Coaching Questions for All

Legacy Is Built in the Decisions That Compound

The questions below ask you to look ahead, at the role inorganic growth will play in the future you're shaping, and whether you're approaching that future with the respect it deserves. These questions are for everyone: Explorer, Dealmaker, and Architect alike. Set aside time to reflect on them. Write your answers down. Bring them to your next coaching conversation with your ClientWise Certified Coach. If you are not engaged in working directly with a ClientWise Certified Coach, consider reaching out to a member of the ClientWise team.

- 1 What role do you want inorganic growth to play in the future of your practice, and have you made that a conscious strategic decision, or has it simply been happening around you?** The most successful practices in this industry don't stumble into M&A. They build toward it. The question isn't whether consolidation is happening. The question is whether you are leading your response to it, or reacting to it.

Notes:

2 **Five years from now, what do you want to be able to say about the M&A decisions you made, and what would you need to do differently starting today to be able to say it?** Legacy is built in the decisions that compound. The transactions you do, or don't do, over the next five years will shape what your practice is, what it's worth, and who leads it. Are you making those decisions with that kind of intentionality?

3 **What is the single biggest obstacle standing between where your practice is today and the inorganic growth future you envision, and is that obstacle external, or is it you?** The most honest answer to this question is rarely about market conditions, valuations, or deal flow. It is usually about clarity, courage, and preparation. What does your honest answer reveal?

Notes:

4 **Who in your world, a potential partner, a key team member, a successor, needs to be part of your inorganic growth thinking, and have you brought them into that conversation yet?** M&A doesn't happen in isolation. The decisions you make ripple outward, through your team, your clients, your partners, and your successors. The leaders who do this well bring the right people into the conversation early. Have you?

5 **If you engaged a ClientWise coach today and committed to the Merger Maximizer™ Coaching Program, what is the best possible outcome you can imagine for your practice twelve months from now, and what is that outcome worth to you?** This is the question that matters most. Not where you are. Where you could be, if you decided to do the work.

Notes:

MY KEY LEARNINGS

Notes:

Your Next Step

No matter where you landed on this assessment: Explorer, Dealmaker, or Architect, the next step is the same.

The ClientWise Merger Maximizer™ Coaching Program

This is a 12 to 16-week structured coaching initiative designed specifically for where you are now. It helps you develop the alignment, clarity, and confidence needed for every successful transaction, covering purpose and impact, leadership, operations, trust, and final business alignment.

For the EXPLORER

Creates the foundation that makes
a first merger possible.

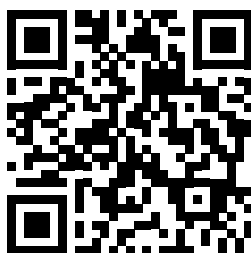
For the DEALMAKER

Sharpens what experience
alone hasn't solved.

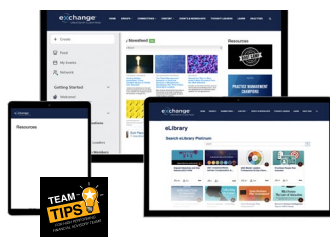
For the ARCHITECT

Gives you something extraordinary
to offer the firms you acquire.

***The ClientWise Merger Maximizer™ doesn't help
you do a deal. It helps you do the right deal,
the right way, and build something that lasts.***



ACCESS CLIENTWISE RESOURCES
Podcast, Blog, Content, Team Tips
and Community eXchange™



About ClientWise

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. Through the growth of individuals at all production levels, our mission is to develop leaders who raise the industry standards of professionalism, service, commitment and integrity. Financial professionals become resourceful problem solvers, more adept practice managers, and better business owners through the ClientWise coaching process. In turn, they bring these sustainable skills to benefit their clients, their businesses, their institutions, and ultimately the industry overall.

As members of the International Coaching Federation (ICF), our coaches adhere to a strict code of ethics and are provided with unique experiences that allow them access to the challenges and opportunities faced by financial professionals on a daily basis. Each coaching program is distinctively tailored to match the professionals' objectives, through services ranging from individual and team coaching, workshop facilitation, team facilitation, and coaching skills training.

This coaching process is coupled with our original ClientWise practice management content, which is developed from in-depth research by industry experts in both coaching and financial services. These proprietary tools and databases, including The ClientWise Benchmark Assessment Report™ and The ClientWise Coach Insights Database™, contain best practices from leading professionals and access to the most significant financial trends and influences worldwide.

Our ability to provide sound industry knowledge through the powerful lens of a coaching partnership is unmatched, and this combination solidifies the ClientWise advantage.

Our Philosophy

The Coaching Partnership

The coaching relationship, unlike that of consulting or advising, is a partnership formed between the financial professional and the coach. The relationship between the two evolves as the professional's business evolves, and as the financial services industry in which it resides evolves. Throughout this partnership, financial professionals work through their initial goals so that they can later attain successively larger goals independently, having achieved the intellectual and emotional mechanisms to self-coach and self-guide through their coaching program.

While each coaching program is defined by a specific timeframe, the relationship between coach and professional, and the tools and to take advantage of the lasting relationship with their coaches by continuing to model the journey learning initiated by their partnership.

Notes:

As our overarching mission is to generate consistent industry improvement through the growth of individual professionals, we continually tap into our resources to generate the best practice management tools and content with which to fuel that improvement. When the financial services industry shifts and changes the environment, we have clarity around how to evolve with it. Our proprietary content and coaching tune up programs allow financial professionals the ability to evolve alongside ClientWise throughout the life of their businesses, providing even more opportunities for success moving forward.

The Axis of Coaching & Content

Content alone, delivered en masse, will not help financial professionals achieve the level of success they desire. Nor will content alone increase the productivity of a given firm or the financial services industry on the whole. Proof of this lies in a marketplace laden with content that is accessible to all financial professionals, the majority of whom continually fall short of their goals. Instead, it is the unique axis at which great content meets a powerful coaching partnership that success is achieved. And it is from here that our founder, Ray Sclafani, launched ClientWise. Ray's understanding of advisor behavior, especially as related to the acquisition programs he created at Alliance Bernstein, motivated him to launch ClientWise in 2006, and develop the distinctive relationship between coaching and content that is now a ClientWise signature.

Our clients' success stories continue to prove that strong content supported by our scalable ClientWise coaching programs achieves far better and more sustainable business results than content alone.

Get Started

Learn more about The ClientWise Coaching Partnership and begin to create sustainable business results.

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