MARKELL ERIC BYRD / ADVISOR ENABLEMENT

Advisor Transition Guide

A practical sequence for moving a book without losing the relationships behind it.

PLAN / COMMUNICATE / PROTECT / MEASURE

A field-ready transition sequence

1. Map the relationship

Identify top households, centers of influence, account dependencies and continuity risks.

2. Set a client communication cadence

Prioritize personal outreach, explain what changes and what remains constant, and prepare answe

3. Prepare the operating handoff

Coordinate the team, documentation, service workflows and escalation owners before launch.

4. Protect continuity

Track household contact, response and unresolved issues; act early where confidence is at risk.

5. Review the first 90 days

Measure retention, service completion, referral flow and advisor capacity; revise the plan week

Practice-management framework; not investment, legal or tax advice.