

NAVIGATOR

Targeting Small Business Owners with COI

Financial advisors typically focus on traditional centers of influence (COI), such as estate attorneys and tax accountants. They are proven and *highly* sought after. However, others options exist and should be explored.

Ideas

Here are COI suggestions (with directory links) of those “in the know”.

1. Business Brokers

Front-line engagement with selling business owners. <https://www.ibba.org/find-a-business-broker/>

2. Business Coaches

Trusted advisor to selling business owners. <https://coachfederation.org/find-a-coach>

3. Business Valuation Consultants

Engaged early with selling business owners.

<https://account.aicpa.org/eWeb/dynamicpage.aspx?webcode=referralwebsearch>

4. Accountants and Attorneys

Firms with M&A practices.

<https://account.aicpa.org/eWeb/dynamicpage.aspx?webcode=referralwebsearch>

https://www.americanbar.org/groups/legal_services/flh-home/flh-bar-directories-and-lawyer-finders/

5. Private Equity

Buyers of businesses (thus creating liquidity events) <https://mergr.com/>

While this isn't an all-inclusive list, these will get you thinking.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.