

Membership Demographics

XPX Advisors

- Work directly with owners/senior managers of lower middle market companies (\$5 to \$100 million in revenues)
- Have expertise in one of our 12 professions (see lists below)
- Demonstrate the **XPX Core Principles** in their work (details in next section – client first, collaboration, think long term, consider the human angle, always be learning).

Distribution

Consultant	25.0%
Wealth Planner	15.0%
M&A Intermediary	10.0%
Accountant	10.0%
Attorney	10.0%
Banker	7.0%
Insurance	7.0%
Valuation	5.0%
Coach	5.0%
Investor	5.0%
Non-profit	0.5%
Virtual Manager	0.5%

Specialties

Accountant

- Tax
- Family business
- Business management
- Finance
- Audit
- Business growth
- Financial Modelling

Attorney

- Mergers
- Buy side/Acquisitions
- Family business
- Estate planning
- Sell side/Divestiture
- Equity
- Due diligence

Banker

- Finance
- Lending
- Business development
- Debt
- Family business
- Investments
- Cash management

Coach

- Business growth
- Business management
- Management succession
- Strategic planning
- Leadership Development
- Change Management
- Entrepreneurship

Consultant

- Business growth
- Business management
- Strategic planning
- Family business
- Entrepreneurship
- Business development
- Management succession

Insurance

- Estate planning
- Employee benefits
- Investments
- Risk management
- Retirement
- Family business
- Strategic planning

Investor

- Equity
- Finance
- Investments
- Family business
- Financial Modelling
- Private equity
- Business development

M&A Intermediary

- Sell side/Divestiture
- Buy side/Acquisitions
- Transaction intermediary
- Mergers
- Transaction advisory
- Finance
- Equity

Non-profit

- Strategic planning
- Board of Directors (not for profit)
- Business growth
- Business management
- Financial Modelling
- Operations
- Cash flow enhancements

Valuation

- Transaction advisory
- Sell side/Divestiture
- Buy side/Acquisitions
- Financial Modelling
- Family business
- Mergers
- Business growth

Virtual Manager

- Business growth
- Strategic planning
- Business management
- Business development
- Change Management
- Leadership Development
- Cash flow enhancements

Wealth Planner

- Investments
- Estate planning
- Retirement
- Family business
- Trusts
- Fiduciary
- Charitable giving

The diversity of the XPX membership is its greatest strength. It gives you a big pool of professionals and specialties to attract to your community. And it ensures that every gathering of XPX members has a rich mix of skills and experience to support business owners in all stages of their business life cycle from growth to transfer and legacy.

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