

AdvisorConduit



Acquisition Origination for
Wealth Management Firms

The right relationship creates the right opportunity.

AdvisorConduit helps wealth management firms identify acquisition opportunities, find successor and buyer matches, connect with experienced M&A professionals, and access financing through a network of strategic relationships.

Most practices see only the deals that happen to reach them: inbound calls, conference conversations, and personal referrals. We work the other direction, building a sourced pipeline against the criteria you set and putting you in front of the owner directly.

Through our network of M&A consultants and lending sources, wealth management practices make more informed and more confident M&A decisions.

01 Acquisition Sourcing

Buy-side pipeline built to your criteria

02 M&A Connections

Introductions to experienced deal professionals

03 Financing Connections

Access to acquisition and business lenders

Three ways we create transaction momentum.

ACQUISITION SOURCING

We identify and introduce wealth management acquisition opportunities based on a buyer's criteria.

M&A CONNECTIONS

We connect advisors considering a sale, merger, or succession with experienced strategic M&A professionals.

FINANCING CONNECTIONS

We introduce advisors seeking acquisition or business financing to appropriate lending partners.

AdvisorConduit is a relationship and opportunity sourcing platform. We are not an investment bank, law firm, accounting firm, valuation firm, or lender.

Our role is to identify relevant opportunities, facilitate introductions, and connect wealth management professionals with the appropriate resources. Diligence, valuation, negotiation, and execution stay with you and your professional advisers.

Your acquisition pipeline starts here.

No more relying solely on inbound opportunities, industry events, and personal referrals. Through an engagement with our buy-side acquisition sourcing service, we help you find the right opportunity to fuel your growth.

01 **DEFINE YOUR CRITERIA**

AUM, geography, revenue, client profile, size, succession objectives, and anything else that determines fit.

02 **WE SOURCE**

AdvisorConduit identifies potential opportunities through its network and direct outreach.

03 **WE INTRODUCE**

You receive the introduction directly to the owner or decision maker.

04 **YOU EVALUATE**

You conduct diligence, valuation, negotiation, and transaction execution with your professional advisers.

ANNUAL ACQUISITION SOURCING ENGAGEMENT

\$25,000 / year

Plus a transaction fee for qualifying acquisitions successfully consummated from AdvisorConduit-sourced opportunities.

Sell once. Sell prepared.

AdvisorConduit has a direct partnership with a highly experienced M&A consulting firm led by industry veterans who have closed over 100 transactions.

Through an introduction to this team, we can help you identify qualified successors, build out your transition plan, and achieve an attractive multiple for the practice you spent a career building.

Sellers that use an M&A consultant see more attractive multiples for their practice and move through deal structure and the M&A process more smoothly.

Successor Identification

Qualified buyers and successors matched to your practice and your clients.

Transition Planning

A structured plan for handing off relationships, staff, and responsibilities.

Deal Structure

Experienced guidance on terms, earnouts, and payment structure.

Process Management

A veteran team running the transaction so you can keep running the practice.

Capital for the deal in front of you.

Through our partnership with an industry lender, AdvisorConduit can align you with financing built for wealth management practices rather than generic small business credit.

Financing determines what you can pay and how quickly you can close. Getting the capital conversation started early keeps a good opportunity from stalling at the last step, and gives you a realistic range before you sit down with a seller.

Acquisition Financing

Capital to fund the purchase of a practice or book of business.

Succession Plan Funding

Financing for internal buyouts and next-generation ownership transitions.

Debt Refinance

Restructuring existing debt on better terms.

Working Capital

Liquidity for hiring, technology, marketing, and operations.

AdvisorConduit is not a lender and does not make credit decisions. We make the introduction; terms, underwriting, and approval rest with the lending partner.

ABOUT

Built on relationships, not listings.

AdvisorConduit was built around a simple idea: the right relationship can create the right opportunity.

We operate at the intersection of wealth management, M&A, and business financing, leveraging relationships with acquisition-minded firms, M&A professionals, and lending partners to connect people who can create value together.

Oscar Zejdlik

FOUNDER

Oscar launched AdvisorConduit in 2026 to serve the small and mid-market wealth management M&A vertical. Through years of work as a Director and Business Development Lead for a boutique lender and investment bank, he saw how many practices and advisors entered M&A transactions uneducated and unprepared.

Working both the buy-side and sell-side of those transactions gave him a clear view of what makes a deal go smoothly for everyone at the table, and AdvisorConduit was created to build those pathways from the start.



Let's start the conversation.

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ADVISORCONDUIT

ACQUISITION ORIGINATION