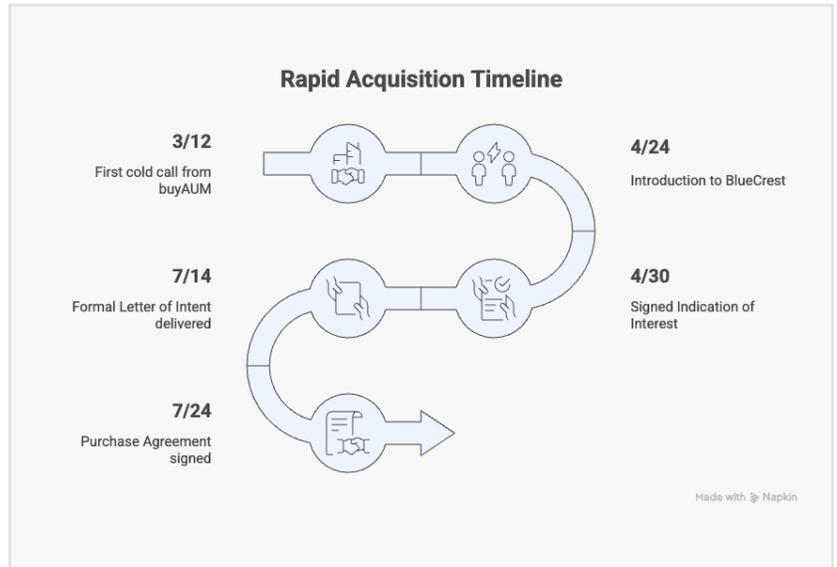


# From Cold Call to Closed Deal in Just 134 Days: How buyAUM Helped Dallas Advisor Bob Hampton Find the Perfect Successor

*buyAUM helped a Dallas advisor exit in just 134 days by matching him with an aligned buyer, proving how succession can be fast, smooth, and built on trust.*

CUMMING, GA, UNITED STATES, September 9, 2025 /EINPresswire.com/ -- [Succession planning](#) is often a painful, years-long process filled with uncertainty and dead ends. But for Dallas-based advisor and CPA Bob Hampton of Impart Financial, the path from first call to final sale took just 134 days—thanks to [buyAUM](#)'s pressure-tested process.



On March 12, Hampton received his first cold call from buyAUM. By April 24, he had been introduced to, a Dallas-based advisory firm. Six days later, on April 30, he signed an Indication of Interest. By July 14, BlueCrest delivered a formal Letter of Intent, and just ten days after that, on July 24, the purchase agreement was signed.

“

He went to one lunch with BlueCrest, and he knew immediately this was the right fit. That speed and precision is the hallmark of our system.”

*Andrew Mirolli*

“Bob didn’t need to go on 50 first dates,” we said. “He went to one lunch with BlueCrest, and he knew immediately this was the right fit. That speed and precision is the hallmark of our system.”

The Weight of Experience

For Hampton, this transition carried more than the usual stakes. Before becoming a financial advisor, he built and sold a successful CPA practice. But that sale left scars. The buyer failed to honor promises and mishandled long-standing relationships, leaving Hampton with regrets after

years of careful work. That experience made him cautious and determined not to repeat the same mistake with his advisory clients.

As he approached retirement, Hampton found himself caught between two worlds: still working hard to serve clients, but yearning to travel the world with his wife. He wanted a way out, but didn't know how to make it happen without risking the trust he'd built.

He explored options, even talking with a firm in Florida. But the distance didn't sit right, and the cultural fit wasn't there. "It was the only option on the table, but it just didn't feel right," Hampton later admitted.

### A System That Works Like Clockwork

That changed when buyAUM called.

The buyAUM team spent three to five hours with Hampton, not just learning about his practice, but helping him articulate what he really wanted in a successor. By the time he sat down for lunch with BlueCrest, the groundwork was already done.

"It was easier than I expected it to be. That's why I appreciate you guys," Hampton said of the process.

The book of business being sold represented \$8 million in managed assets, part of Hampton's overall \$15 million AUM. While the numbers were modest by industry standards, the outcome underscored something far more important: with the right process, even smaller books can transition quickly, cleanly, and with everyone satisfied.

### From First Lunch to Final Agreement

The speed of the outcome was almost unheard of in the industry.

- 3/12 – First cold call from buyAUM
- 4/24 – Introduction to BlueCrest
- 4/30 – Signed Indication of Interest
- 7/14 – Formal Letter of Intent delivered
- 7/24 – Purchase Agreement signed

From start to finish: 134 days.

And once Hampton met BlueCrest, the decision was easy. He told buyAUM he wanted to stop conversations with the Florida group and sell to BlueCrest. From there, buyAUM worked closely with both sides to structure a deal that worked: Hampton felt secure about the future of his clients, and BlueCrest acquired a culturally aligned practice on favorable terms.

## Everyone Walks Away Smiling

The story didn't end with the signing. Hampton, now easing into retirement, continues to refer prospects to BlueCrest, relationships that weren't even part of the sale. "I'm getting out of the business," he told them, "but you should meet BlueCrest."

That kind of endorsement shows how different this experience was from his CPA sale years earlier. Where that transition had been marked by broken promises, this one left Hampton confident, relieved, and grateful.

The buyer, too, walked away smiling—not just with new AUM, but with the goodwill of a respected local advisor vouching for their future.

## The Bigger Lesson

This modest deal proves a larger point: succession doesn't have to be slow or uncertain. With buyAUM, it can be fast, aligned, and confidence-driven.

Hampton's story is proof. In just 134 days, he went from uncertain to retired—confident his clients and legacy were protected.

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