

DEAL CLOSING

Frequently Asked Questions

- ◆ How does the deal closing process work?
After due diligence is complete and the necessary legal documents are finalized, we will host a call with Avantax and your legal counsel to close the transaction. Immediately after the call, Avantax will wire closing proceeds to your specified bank account.
- ◆ Will I be able to keep my office location?
Most firms can stay in their current office locations. Minimizing disruption to your business is our priority. Our Real Estate team will visit your offices as part of Due Diligence and manage the transition of the facility to APP management.

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