

“Our last acquisition did not go well. We need to be ahead of the risks and impacts on our members and employees this time around.”

“We acquired a new credit union and we’re in the onboarding process. The operational, technical, and data integration is more complex than expected and we’re concerned about timing.”



MERGER & ACQUISITION ADVISORY

PEOPLE, PROCESS + TECHNOLOGY



Navigate complex business transactions.

The opportunity to acquire or merge credit unions on a national scale brings along with it all sorts of risks to navigate. Your members and employees suddenly experience a new culture, organizational design, and set of systems, data, and processes. Partner with a team of experts to manage changes that realize value faster, with less risk.

WHY A PEOPLE, PROCESS, TECHNOLOGY APPROACH?

- + Maximize ROI with a focus on the greatest impacts.
- + Reduce risk by identifying culture, process, or technology issues earlier.
- + Increase speed and reduce missteps by planning for integration early.
- + Improve operational efficiencies and eliminate barriers to success once the deal is closed.

M & A ADVISORY PROCESS



HOW DOES FARWELL HELP? | REDUCE RISK. GAIN EFFICIENCY.

RIGHT-FIT DISCOVERY™

Our no cost, no obligation Right-Fit offerings set up organizations for more effective projects. We get up to speed before providing solutions.

SIDE-BY-SIDE PLANNING

We work with you to create an optimal solution that will achieve success. We Right-Fit our recommendations so that your goals are achievable and sustainable.

ROLL-UP OUR SLEEVES EXECUTION

We deliver the right expertise at the right cadence, orchestrating successful outcomes. Using our planning as the guide, you can continually confirm we’re creating value.

Between 70 and 90 percent of mergers and acquisitions fail. - HARVARD BUSINESS REVIEW

The reason for this failure rate is complex, but most experts emphasize integration challenges to be the explanation. Manage your business risk and realize the value of a right fit deal with these tested practices:



Grow your business with entrepreneurial partners who advise and step in to execute along the way.