Why It Matters

Succession planning is about more than preparing for retirement — it's about protecting the relationships and trust built over years of service.

For clients: Confidence that their financial future remains stable, even through advisor transitions.

For advisors: Assurance that the legacy of their work will continue, and that clients are cared for with the same values they've always upheld.

For families and businesses:
Continuity, clarity, and the peace of knowing nothing is left unfinished.

At inSOURCE, we believe succession isn't an ending — it's the start of a new chapter where advisors and clients thrive together.

inSOURCE
Financial Advisors

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LET'S BUILD YOUR PLAN TOGETHER.

Every advisor has a story. Every client deserves stability. Whether you're planning for retirement, scaling your practice, or simply thinking ahead, now is the time to put your plan in place.

Watch Bryan & Josh's story at insourcecentral.com/succession

OFFICES

Lincoln
390 North Cotner Blvd
Lincoln, NE 68505

La Vista
12120 Port Grace Blvd, Ste 101
La Vista, NE 68128

Fremont
1910 North Bell Street
Fremont, NE 68025

Trussville
8178 Gadsden Highway, Ste 104
Trussville, AL 35173

Representatives offer products and services using the following business names: inSOURCE Financial Advisors – insurance and financial services | Ameritas Investment Company, LLC (AIC), Member FINRA/SIPC – securities and investments | Ameritas Advisory Services (AAS) – investment advisory services. AIC and AAS are not affiliated with inSOURCE Financial Advisors.

LEAVE A LEGACY
not loose ends.

How a structured plan ensures continuity for clients and clarity for advisors

inSOURCE
Financial Advisors

Why I Chose inSOURCE

Three years ago, Bryan Holen made the decision to leave a large corporate agency. The reason was simple: the culture no longer aligned with the way he wanted to serve his clients.

At inSOURCE, Bryan discovered something different:

- A team that works together, sharing expertise instead of competing.
- A culture rooted in collaboration, support, and trust.
- Access to a wide range of solutions, ensuring clients always receive the best possible guidance.
- A commitment to succession planning that protects advisors' legacies and clients' futures.

What Succession Looks Like

After decades of serving clients, Bryan began thinking about the future. How could he ensure his clients would continue to receive the same level of care and attention when he eventually retired?

The answer was a structured succession plan with PGA graduate, Josh Mikus.

Plan – Define the timeline, roles, and client communication strategy.

Partner – Work side-by-side, meeting with clients together to build trust.

Protect – Safeguard the legacy of the advisor and ensure continuity for every client relationship.

Every advisor works hard to build trust and lasting relationships. A clear succession plan ensures that trust continues for decades to come.

Start building your own plan at insourcecentral.com/succession.

"Succession isn't just about stepping away. It's about handing off, in a way that clients feel supported at every step." – Bryan

Meet Your Future Advisor

Josh Mikus is a graduate of inSOURCE's Paid Graduate Apprenticeship (PGA) program — designed to train the next generation of financial professionals. With a strong background in financial planning and a passion for building relationships, Josh has been working alongside Bryan to ensure a smooth transition.

By meeting clients together, Josh has the opportunity to understand their goals, listen to their concerns, and build trust before Bryan steps away.

"I'm honored to be part of Bryan's legacy. This isn't a handoff that happens overnight — it's a thoughtful process that ensures every client knows they are in good hands." – Josh