

3 - Member Demographics

XPX Advisors

- Work directly with owners/senior managers of lower middle market companies (\$5 to \$100 million in revenues)
- Have expertise in one of our 12 professions (see lists below)
- Demonstrate the [XPX Core Principles](#) in their work (details in next section – client first, collaboration, think long term, consider the human angle, always be learning).

Distribution

The average breakdown of Chapter Members by profession is as follows. Please note that some members have more than one profession. This is why the consultant category seems somewhat over-represented.

Consultant	25.0%
Wealth Planner	15.0%
M&A Intermediary	10.0%
Accountant	10.0%
Attorney	10.0%
Banker	7.0%
Insurance	7.0%
Valuation	5.0%
Coach	5.0%
Investor	5.0%
Non-profit	0.5%
Virtual Manager	0.5%

Specialties

These are the top seven specialties of our members by profession:

Accountant

- Tax
- Family business
- Business management
- Finance
- Audit
- Business growth
- Financial Modelling

Attorney

- Mergers
- Buy side/Acquisitions
- Family business
- Estate planning
- Sell side/Divestiture
- Equity
- Due diligence

Banker

- Finance
- Lending
- Business development
- Debt
- Family business
- Investments
- Cash management

Coach

- Business growth
- Business management
- Management succession
- Strategic planning
- Leadership Development
- Change Management
- Entrepreneurship

Investor

- Equity
- Finance
- Investments
- Family business
- Financial Modelling
- Private equity
- Business development

Valuation

- Transaction advisory
- Sell side/Divestiture
- Buy side/Acquisitions
- Financial Modelling
- Family business
- Mergers
- Business growth

Consultant

- Business growth
- Business management
- Strategic planning
- Family business
- Entrepreneurship
- Business development
- Management succession

M&A Intermediary

- Sell side/Divestiture
- Buy side/Acquisitions
- Transaction intermediary
- Mergers
- Transaction advisory
- Finance
- Equity

Virtual Manager

- Business growth
- Strategic planning
- Business management
- Business development
- Change Management
- Leadership Development
- Cash flow enhancements

Insurance

- Estate planning
- Employee benefits
- Investments
- Risk management
- Retirement
- Family business
- Strategic planning

Non-profit

- Strategic planning
- Board of Directors (not for profit)
- Business growth
- Business management
- Financial Modelling
- Operations
- Cash flow enhancements

Wealth Planner

- Investments
- Estate planning
- Retirement
- Family business
- Trusts
- Fiduciary
- Charitable giving

The diversity of the XPX membership is its greatest strength. It gives you a big pool of potential members to attract to your community. And it ensures that every gathering of XPX members has a rich mix of skills and experience to support business owners in all stages of their business life cycle from growth to transfer and legacy.

While the membership is diverse, it is united by a core set of values described in the [XPX Advisor Principles](#).