

## LPL FINANCIAL SELECTED ECHELON PARTNERS FOR ITS VENDOR AFFINITY PROGRAM

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~ **ECHELON Partners** is the leading Investment Bank focused on the Wealth and Investment Management industry with their total platform approach of Valuation, M&A and Consulting Services now available to LPL's 14,000 Advisors

**Manhattan Beach, CA. May 22, 2017.** ECHELON Partners, a leading investment bank focused on the wealth and investment management industry, announced today that it has been selected by LPL Financial, the nation's largest independent broker/dealer, as a participant in the firm's Vendor Affinity Program.

As part of the program, ECHELON Partners will offer LPL's 14,000 financial advisors with key Valuation, M&A Advisory, and Consulting Services that enable them to better manage, grow and optimize their firms.

In addition to a complimentary introductory meeting, ECHELON Partners' total platform approach offers the following services to LPL advisors:

- Valuations
- Management Consulting Services
- LEAN Consulting Services
- Succession and Continuity Planning Services
- Merging, Selling & Buying Services: Investment Banking
- Research Presentations

"LPL Financial has been the leading independent broker-dealer in the wealth management space for more than 20 years, enjoying a tremendous track record of helping its advisors grow and succeed," said **Carolyn Armitage**, Managing Director of ECHELON Partners. "As LPL's advisors have grown in size and complexity, they may be seeking advanced Valuation, M&A and Consulting Services to optimize their firms for sustainable growth and transferable value. We are thrilled to offer those services to LPL Financial advisors as a member of the Affinity Program," notes **Dan Seivert**, CEO of ECHELON Partners.

The program is designed to help advisors reduce the complexity and costs of running their businesses. The program consists of a select group of firms and vendors that offer products and services to LPL Financial advisors. For some in the program, like Echelon Partners, the offering is oriented specifically for LPL advisors. Participants were selected for inclusion in the program based on experience working with wealth managers, their ease of doing business with LPL advisors and their ability to meet certain security and compliance requirements.

"At LPL, we remain committed to developing smarter and simpler ways to do business," said Dan Arnold, LPL Financial CEO and president. "The Vendor Affinity Program is a tangible way that LPL's scale can directly impact our clients' bottom line and further underscores the value in affiliation with LPL."

### About ECHELON Partners

Founded over 15 years ago, ECHELON Partners [www.echelon-partners.com](http://www.echelon-partners.com) combines the high quality expected of a large investment bank with the high-touch expected of a personal boutique. ECHELON Partners is transforming succession planning and M&A for the wealth management industry through a total platform approach serving large producers, offices, Super OSJs and Enterprises and RIA firms through all their lifecycles. Our services include investment banking, management consulting, valuation and board advisory. Our

resources include research reports, legal contracts, databases and financial models. Our team consists of credentialed and experienced professionals.

We believe the keys to successfully serving clients are a wealth and investment industry focus, a comprehensive approach, execution experience and excellence, recognition by industry leaders and an affinity toward entrepreneurship. ECHELON Partners is committed to bringing all of these qualities to every client assignment. With a track record spanning hundreds of engagements our team understands the unique needs of owners and executives in the financial services industry.

