

FINANCIAL SERVICES INSTITUTE (FSI) SELECTS ECHELON PARTNERS FOR ITS COVEREDADVISOR AFFINITY BENEFITS PROGRAM

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~ECHELON Partners is the leading Investment Bank for the Wealth and Investment Management industry with their total platform approach of Valuation, M&A and Management Consulting Services now available to FSI's 100 firm members and their 160,000 Advisors.

Manhattan Beach, CA. May 31, 2017. ECHELON Partners, the leading investment bank for the wealth and investment management industry, announced today that it has been selected by the Financial Services Institute (FSI), the industry's leading association of independent financial services firms and independent financial advisors, as a partner in FSI's CoveredAdvisor Affinity Benefits Program.

As part of the program, ECHELON Partners will offer FSI Members M&A and Valuation Services, Continuity Planning, Succession Transitions and Management Consulting Services that will 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 FSI members:

- M&A Services; Investment Banking, Buying, Selling and Merging Firms
- Valuation Services
- Succession Planning
- Continuity Planning; ECHELON Partners can serve as the Continuity Partner for unplanned events
- Management Consulting Services; Strategic Planning and Positioning, Research, Compensation and Equity Plans, Board Meetings, and LEAN Consulting

"Since its inception, I have been an advocate of the Financial Services Institute and the firms they represent," said **Carolyn Armitage, CFP®, CIMA®**, Managing Director of ECHELON Partners. "With over 110,000 Advisors preparing to transition over the next decade and the financial services industry experiencing the most rapid rate of change, ECHELON Partners is pleased to provide the guidance and expertise needed to best optimize their firms for profitable and sustainable growth."

FSI's CoveredAdvisor Affinity Benefits program consists of selected partners who offer key products and services firms need to remain successful and better manage their businesses.

"We are proud to have ECHELON Partners in our CoveredAdvisor program," said **Dale Brown, FSI's President & CEO**. "It demonstrates their support for our members by providing solutions to achieve shared goals and help us in advocating for a healthier, more business-friendly regulatory environment. Key partnerships with organizations across the industry are critically important to the success of FSI and our members."

"We are thrilled to be recognized by FSI by including ECHELON Partners in their CoveredAdvisor Affinity Benefits Program. Our total platform approach of M&A, Valuation and Management Consulting services is resonating strongly in the industry and we value being a trusted partner with FSI," said Armitage.

To learn more about ECHELON Partners Total Platform approach, log onto www.echelon-partners.com.

About ECHELON Partners

Founded over 15 years ago, ECHELON Partners 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.

About the Financial Services Institute (FSI): The **Financial Services Institute (FSI)** is the only organization advocating solely on behalf of independent financial advisors and independent financial services firms. Since 2004, through advocacy, education and public awareness, FSI has successfully promoted a more responsible regulatory environment for more than 100 independent financial services firm members and their 160,000+ affiliated financial advisors – which comprise over 60% of all producing registered representatives. We effect change through involvement in FINRA governance as well as constructive engagement in the regulatory and legislative processes, working to create a healthier regulatory environment for our members so they can provide affordable, objective advice to hard-working Main Street Americans. For more information, please visit financialservices.org.
