

ECHELON PARTNERS FORMALLY LAUNCHES WEALTHTECH INVESTMENT BANKING PLATFORM; ADDS THREE KEY HIRES

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ECHELON Partners, a leading investment bank focused exclusively on the investment and wealth management industries, announced today the formal launch of its investment banking platform for the wealth technology sector, as well as the hiring of three experienced professionals to manage overall company growth.

As a complement to the significant increase of private equity, venture capital and corporate investment into the space, ECHELON Partners' WealthTECH investment banking platform will cater to the fast-growing segment of technology firms that serve the wealth management industry.

"As the industry has grown, there has been a direct correlation of growth and investment in technology companies serving all aspects of the wealth management space," said **Dan Seivert**, CEO of ECHELON Partners. "We have worked with WealthTECH companies of all sizes, stages of development and functionality, from firms like FiServ, SEI and Bisys, to firms like Laserfiche, FolioDynamix and Total Rebalance Expert (tRx). We are very excited to formalize our investment banking platform in this space and further customize our offering to meet the specific requirements of this evolving industry."

"The rise and evolution of robo advisors will continue to change the wealth management landscape, and the way companies decide to utilize and integrate them into their broader technology platform will be critical to their future success," Seivert further notes. "As a result, we anticipate that traditional firms will be focused on acquiring these capabilities and we are actively building out our investment banking capabilities to support their strategies."

ECHELON has developed a proprietary mapping system that segments the wealth management technology ecosystem of over 1,000 companies into 6 WealthTECH sectors and 42 subsectors. This keen insight will be invaluable to helping WealthTECH companies understand their positioning in the ecosystem and thus the full scope of options available to them, especially through M&A and capital raising strategies.

ECHELON's comprehensive WealthTECH M&A process consists of strategic planning, valuations, transaction and offer analyses, developing target profiles, soliciting and managing offers, negotiating deal terms, procuring financing and updating legal documents.

"ECHELON Partners is the only investment bank to offer a customized package of services to wealth management technology companies looking to engage in M&A and capital raising activities," Seivert said. "Our deep understanding of this market landscape and the intricacies associated with valuing and marketing WealthTECH companies uniquely position us as the 'go-to' solution for these fast growing companies."

ECHELON Partners also announced today the hiring of three senior investment banking professionals to continue to manage company growth. Joining the firm as Managing Director, Michael Wunderli comes to ECHELON with a Wharton MBA and 13 years experience as a Senior Wealth Manager at Lehman Bros and UBS. Wunderli pioneered one of the industry's most prodigious hybrid businesses between investment banking and private wealth management, where he sourced over \$2 billion in investment banking and private equity transactions for business owners, while also managing over \$400 million for high-net-worth investors.

Also joining the ECHELON team are Lucas Barash-David and Adam Johnston. Barash-David comes to ECHELON Partners from Fisher Investments, one of the country's largest RIAs, while Johnston comes to ECHELON from Goldman Sachs, one of the country's premier investment banks.

"Mike brings a highly unique skillset, experience and entrepreneurial mindset to ECHELON and will be a key leader in supporting our company growth," Seivert said. "Both Lucas and Adam have the experience, skill sets and knowledge of wealth management that will be key to supporting our clients in meeting their goals."

About ECHELON Partners

Founded over 15 years ago, ECHELON Partners <http://www.echelon-partners.com> combines the high quality expected of a large investment bank with the high touch expected of a personal boutique. Unlike traditional investment bankers, ECHELON Partners brings together financial advisory, strategic consulting, and senior-level operational experience to each engagement. The firm believes the key element to successfully serving clients are a deep understanding of the wealth and investment management businesses, an extensive network of contacts, a powerful set of processes and databases, integrity, and trust. ECHELON Partners is committed to bringing all of these qualities to every client assignment. With a track record spanning hundreds of engagements and valuations, the ECHELON team understands the unique needs of owners and executives.

