

## ECHELON PARTNERS OPENS REGISTRATION FOR THE DEALS & DEAL MAKERS SUMMIT 2015

6/24/15 Press Release

- *2015 DDM Summit to explore the financial engineering behind deal making in wealth management*
- *“Ask the Experts “speed-dating” session, among the most popular in 2014, is back with an even larger array of exceptional consulting firms*
- *Echelon’s DDM Summit is the only industry conference exclusively focused on deals*

**Manhattan Beach, CA – June 22<sup>nd</sup>, 2015** – Echelon Partners, [www.echelon-partners.com](http://www.echelon-partners.com), announced that registration has opened for the popular Deals & Deal Makers Summit [www.dealsanddealmakers.com](http://www.dealsanddealmakers.com), to be held at the Island hotel in Newport Beach, CA on Sept. 16<sup>th</sup> and 17<sup>th</sup>, 2015. This year’s Summit will focus on the subject of “financial engineering” as pertains to deal making in wealth management. All presenters bring a wealth of experience in advising wealth management firms on deal making and/or growth.

The DDM Summit will once again open with Echelon’s CEO, Dan Seivert providing his unique and candid assessment of the wealth management industry deal landscape. In 2014, Seivert shocked the audience by conveying the actual number of deals occurring vs. how many had been “reported” via the media. The contrast brought audible gasps to the audience.

Launched in the fall of 2013 in Santa Monica, CA, The Deals & Deal Makers (“DDM”) Summit is a different kind of conference, one focused entirely on the art and science of the deal. Every presentation is designed to educate and inspire potential deal makers with wisdom they can directly apply to the inorganic growth strategy of their own wealth management business.

“Robos, fin-tech, the fiduciary debate. . . these all get a lot of media buzz,” said Seivert. “They trend as topics covered in our industry, but nothing moves the needle quite like a deal. Wealth management firms want to acquire, firms want to be acquired, all for different reasons – when these deals are announced they fascinate us. This special facet of wealth management deserves its own conference – we’re happy to oblige.”

This year’s agenda includes the following sessions:

- The Human Dynamics of “The Financial Deal”: Maximizing Potential While Humanizing Risks
- Breaking Up Is Hard to Do. . . Learn How To Master It
- Super Models: Fine Tune Your Business Model to Optimize Financial Performance
- The Most Powerful Trends in Wealth Management Deal Making
- Demystifying the Financial Engineering of Deal Makers

In addition to the above sessions, the “Ask the Experts” session will again feature some of the industry’s top consulting firms. Given only minutes to explain their value-add to wealth management firms that pass by, this no-pressure, highly informative format left all parties energized and in fact introduced some compatible parties. The pace and caliber of the group both complemented each other well and were highly praised by attendees.

The Mission of the DDM Summit is to provide wealth managers with advanced education and training, unparalleled networking opportunities and a unique experience that stands apart from other industry conferences and workshops.

To register for the event, and to view the complete agenda and speaker lineup, please visit [www.dealsanddealmakers.com](http://www.dealsanddealmakers.com)

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*To register as a media guest, please contact Jason Lahita at (973)460-7837 or [jason.lahita@ficommpartners.com](mailto:jason.lahita@ficommpartners.com).*

### **About Echelon Partners**

At ECHELON Partners [www.echelon-partners.com](http://www.echelon-partners.com) we combine the high quality expected of a large investment bank with the high touch expected of a personal boutique. Unlike traditional investment bankers, the ECHELON Partners team brings together financial advisory, strategic consulting, and senior-level operational experience to each engagement. We believe the keys to successfully serving clients in this industry are a deep understanding of the business, 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, our team understands the unique needs of owners and executives.

### **About The Deals & Deal Makers Summit**

The DDM Summit [www.dealsanddealmakers.com](http://www.dealsanddealmakers.com), returns to Southern California this September! Don’t miss your opportunity to experience the event that industry-leading experts call “truly unique” and “exceptionally valuable”. Dive deep into this year’s theme; **the financial engineering behind deal making**.

Participate in engaging sessions that provide unparalleled education on deal-oriented topics, exploring the challenges and keys to success of exceptional deal makers. The Deals & Deal Makers Summit provides the ultimate combination of networking, learning, brainstorming, and motivation to capitalize on a host of attractive ideas and opportunities in our industry.

Engage in networking opportunities with industry-leading deal advisors and centers of influence in the areas of insurance, financing, accounting, investment banking, private equity, public relations, and psychology of change. Relationships forged at the DDM Summit lead to follow on conversations, transactions, and life-time partnerships.

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