

## ECHELON PARTNERS NAMED FINALIST FOR THE 2016 WEALTHMANAGEMENT.COM INDUSTRY AWARDS

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**ECHELON Partners**, a leading investment bank focused exclusively on the wealth and investment management industries, announced today that it has been selected as a finalist for the WealthManagement.com 2016 Industry awards.

The awards program is a one-of-a-kind acknowledgement honoring outstanding achievements and innovation by companies that support financial advisors. ECHELON Partners received two of the four available nominations for its contribution in the Investment Banks, Lenders and Succession Planning Consulting category.

This award recognizes companies with a new initiative, program, platform or industry content that facilitates the succession/transition process for advisors and their business. The criteria include both quantitative and qualitative measures such as innovation, creativity, service integrations and new methods of deployment.

The first nomination ECHELON is being recognized for is its Equity Glide Path Program. The Equity Glide Path Program is a financial analysis framework designed to implement a schedule of ownership within an advisory firm. It is a comprehensive succession planning solution that provides highly customized advice and tactics throughout the life-cycle of the succession transition period.

The second nomination is for ECHELON's Buyer Preparation Services. ECHELON's comprehensive suite of buyer preparation services has been designed to provide firms and their executives with the flexibility to choose the specific elements that align with their needs. ECHELON recognizes that firms are often at different stages of preparedness when it relates to acquiring a new business. Accordingly, drawing on its depth of industry-specific experience in evaluating, facilitating, and structuring transactions, ECHELON's buyer preparation services are designed to prepare firms and their executives to be fully ready to maximize the value in any future acquisition.

"There are a lot of innovative and visionary companies and executive teams we greatly respect among the nominees. It's great to be in their company," said Dan Seivert, CEO of ECHELON Partners. "We're incredibly excited for this industry recognition."

The award finalists were determined by a panel of judges comprised of the top names in the industry. The winners will be announced at a gala reception at the Mandarin Oriental Hotel in New York in New York on September 29th.

### 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.