

ECHELON PARTNERS ANNOUNCES AGENDA AND SPEAKER LINEUP FOR THE 2017 DEALS & DEAL MAKERS SUMMIT

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ECHELON Partners, the leading investment bank for the wealth and investment management industry, announced today the final agenda and speaker lineup for the 2017 Deals and Deal Makers Summit. The sixth annual event will be held at the refined and stylish Island Hotel in Newport Beach, CA, September 18-19, 2017, focusing on the theme of "Capitalizing on Market Cycles and Secular Change."

Joining ECHELON Partners' CEO, **Dan Seivert**, will be Pershing Advisor Solutions CEO Mark Tibergien in a debate-style keynote on the top issues facing dealmakers in an ever-changing industry.

"The industry is in the midst of consolidation, driven by a number of factors, including aging demographics, regulatory changes, shifting consumer expectations, an aging bull-market, and the impact of new technology-driven business models," said Seivert. "These converging conditions are creating once-in-a-generation opportunities for M&A strategies, however, dealmakers need to understand the impacts of these changes to fully capitalize on them."

ECHELON Partners has specifically designed the content for the 2017 Deals & Deal Makers Summit to provide key insight into these issues, empowering attendees to be fully-informed and ready to apply that knowledge in driving their strategic growth strategies.

The two-day program will feature a number of revealing presentations led by industry experts on human capital strategies, executive leadership, financing alternatives, negotiation approaches, as well as the landscape for capital raising.

Additionally, the Summit will convene a pivotal discussion, entitled, "Harvesting Advisors in Transition" on the landscape and outlook for the breakaway advisor movement. As breakaway activity continues to surpass previous records, combined with an aging wirehouse advisor force, trillions of dollars of assets will be in transition among deal makers - a session not to be missed.

Accenting the conference is the unique ability for attendees to "Ask the Experts" in a one-on-one, open forum, where attendees schedule time with top consultants, experts and advisors to the wealth management industry to have their specific concerns addressed in a welcoming setting.

Rounding out the program will be multiple networking opportunities with attendees, speakers and strategic partners in the luxurious setting of the Island Hotel in Newport Beach, CA. As a key strategic partner, PIMCO will host a portion of the conference at their state-of-the-art headquarters, enabling attendees to hear from Joachim Fels, Global Economic Advisor & Managing Director, PIMCO, one of the industry's largest and best-known asset managers.

"We are thrilled to bring the industry's deal makers together to engage, energize and encourage executives to pursue their business goals," said **Carolyn Armitage**, Managing Director, ECHELON Partners. "The conference gets better and better every year and we are confident that it will once again be the catalyst for many of the deals that will be the headlines in the coming year."

To learn more and register for the Deals & Deal Makers Summit, visit <http://www.DealsandDealMakers.com>

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. 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.
