

ECHELON PARTNERS NAMED A MULTIPLE FINALIST IN THE WEALTHMANAGEMENT.COM 2017 EXECUTIVE FORUM AND INDUSTRY AWARDS

8/29/2017 Originally Published by ECHELON Partners, PR Web

ECHELON Partners, the leading investment bank for the wealth and investment management industries, with a total platform approach of valuations, M&A and management consulting services, announced today that has been named a multiple finalist in the prestigious wealthmanagement.com 2017 Executive Forum and Industry Awards for the Investment Banks/Lenders/Succession Planning Consultants category #WMIA17. Now in its 3rd year, the 2017 Executive Forum and Industry Awards recognizes companies for innovation and achievement that support financial advisor success. A judging panel of eight industry luminaries awarded ECHELON Partners among a number of applicants with two of the nominations in this category.

ECHELON Partners is a finalist for the RIA M&A Deal Report. This research report and website, <https://www.riadealbook.com>, was developed to identify the key transactions and M&A trends in the RIA, Broker/Dealer, Hybrid, wealthTECH and investment management marketplace and is often cited throughout the financial services industry. The ECHELON Deal Report is unrivaled as it is the most in-depth reporting on RIA deals, breakaway broker activity, investment management deals and a new category for transitions in the wealthTECH industry.

Additionally, ECHELON Partners is also a finalist for the launch of a new firm, RIA Valuations, <https://www.ria-valuations.com>. This new approach provides valuation services combined with practice management support specifically for RIA firms. The new company provides a robust product and resource suite that includes 11 distinct, needs-based valuation solution packages, a repository of valuation research reports, and the online tools and technologies for larger institutions to offer these resources to the RIAs they serve.

"We are honored to receive this validation for the innovation and new resources for the wealth and investment management industries, from a highly respected industry publication," said **Dan Seivert**, CEO, ECHELON Partners. "It is a true honor to be recognized as the leader in this category and we look forward to the Executive Forum and Gala event in New York City on October 11, 2017 where the industry's best and brightest will gather to celebrate all the winners."

Extending its industry leadership, ECHELON Partners is hosting the 6th annual Deals & Deal Makers Summit, a two-day conference featuring a number of revealing presentations led by industry experts on capital raising and the outlook for M&A in the wealth management space, human capital strategies, executive leadership, financing alternatives and negotiation approaches. The Summit will be held at the exquisite Island Hotel in Newport Beach, CA, September 18-19, 2017, focusing on the theme of "Capitalizing on Market Cycles and Secular Change."

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

To learn more about ECHELON Partners total platform approach, visit <http://www.echelon-partners.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 engagement.

