

ECHELON PARTNERS ANNOUNCES KEYNOTE SPEAKERS FOR THE DEALS & DEAL MAKERS SUMMIT 2015

8/3/15 Press Release

- Popular debate-style head to head will return, but in “doubles” format
- Mark Tibergien and Dan Seivert, perennial key-note speakers, to be joined by deal veterans Peter Raimondi and Jeff Dekko
- Four hours devoted to one-on-one “Ask-The-Experts Sessions” with more than 20 leading deal advisors
- Keynote speakers will focus on, among other topics: “the likelihood of a cultural deterioration after roll-up IPO”, “the benefits and drawbacks of a unified brand for roll-ups”, and “allocating 25% of firm equity to advisors – good or bad deal?”

Manhattan Beach, CA – August 3rd, 2015 – Echelon Partners, www.echelon-partners.com, announced the keynote panelists for the popular Deals & Deal Makers Summit www.dealsanddealmakers.com, to be held at the Island Hotel in Newport Beach, CA on Sept. 16th and 17th, 2015. The Summit will focus on the “financial engineering behind deal making” in the wealth management industry. In that vein, the keynote panel will drill deep into the dynamics of the deal, introducing two veteran RIA deal makers to join the widely regarded debate between Dan Seivert and Mark Tibergien which is now in its fourth edition.

Peter Raimondi and Jeff Dekko are not only industry veterans, but within the last year have each guided their firms through significant transactions. Raimondi’s Banyan Partners sold to Boston Private in a deal valued at \$60M and Dekko’s Wealth Enhancement Group sold a controlling interest to Lightyear Capital LLC – an industry focused private equity firm that had previously invested in Cetera and divested in a sale to RCS Capital Corporation.

In terms of the debate, both Tibergien and Seivert are known for their high-energy back and forth, each taking an industry position (which they may or may not agree with) and rigorously defending that position while an engaged audience not only looks on, but participates by voting on which side of the argument they believe in – it is the responsibility of the speakers to make a strong case.

“We are thrilled to welcome Peter and Jeff this year, not only for their acumen as deal makers but because they have so recently gone through mega-deal transactions and have such a fresh perspective,” said Seivert. “Mark and I have been sparring for years now and while it’s always an exciting competition we’re very much looking forward to adding the “applied perspective” by pairing with two of the industry’s most respected and experienced CEOs.”

Raimondi will join Tibergien and together the men have 74 years of industry experience, having advised on over 100 deals combined. Dekko joins Seivert, and while the combined industry experience here may only add up to 42 years, they advised on over 300 deals and both have considerable private equity experience. Game on!

A sampling of the six debate topics the deal makers will go head to head on:

1. Whether allocating 25% of a roll-up firm's equity is a good or bad deal – for advisors!
2. Whether or not a roll-up IPO spells doom for the firm's culture
3. The pros and cons of brand unification for roll-ups

This year's Deals and Deal Makers Summit also 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

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. The DDM Summit will also bring back a four hour networking session to kick things off called the "Ask-the-Experts Sessions": www.ddmsummitexperts.com.

To register for the event, and to view the complete agenda and speaker lineup, please visit 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.

About Echelon Partners

At ECHELON Partners 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, 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.

Via the "Ask-the-Experts Sessions", www.ddmsummitexperts.com, attendees network 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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