

## ECHELON PARTNERS ANNOUNCES SPEAKERS, TOPICS AND THEME FOR NYC EDITION OF THE DEALS & DEAL MAKERS SUMMIT 2016

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- **ECHELON Partners CEO Dan Seivert** to reveal fresh industry deal metrics available only to attendees of the industry's premier deal-makers forum, to be held October 18th & 19th, at the NY Athletic Club in Manhattan
- Mark Tibergien, CEO, Pershing Advisor Solutions will join Seivert to reprise their one-of-a-kind keynote "debate" on the Future of Wealth Management
- Sessions include: "Inside the Negotiations and Structuring of Savvy Buyers and Sellers"; "Dealing for Human Capital: Lift Outs, Breakaways, and Tuck-Ins..." "Oh My"; and "The Secrets of Technology Disruptors and Their Impact on Deal Making" and more...

ECHELON Partners, [www.ECHELON-partners.com](http://www.ECHELON-partners.com), announced today the final speaker and topic lineup for a special NYC edition of its popular Deals & Deal Makers Summit ([www.dealsanddealmakers.com](http://www.dealsanddealmakers.com)), to be held at the NY Athletic Club in Manhattan, October 18th and 19th, 2016. This year's theme is "Capitalizing on Market Cycles and Secular Change".

ECHELON Partners is issuing new data that shows we are currently in the third longest business cycle in the past 100 years. This has significant implications for aspiring deal makers, looking to time their transactions.

For sellers, it means that they need to consider expediting transactions before the cycle turns. If they don't, they face the prospect of: a) missed deals, b) reductions in valuation, c) drops off in buyers and buyer interest, and/or d) the trigger of claw-back provisions. As in most cycles, the trough that follows the peak usually carries a 30% reduction in valuations and imposes a 3-4-year potential delay before prior valuation levels are reached again. This has major implications for succession plans.

The implication for buyers is that they run the risk of paying peak cycle prices only to see a major fall off in the value of their investments should the cycle turn. Those considering a merger will be pleased to know that cycle troughs are favorable for them and mergers usually pick up during that time.

We are currently experiencing major secular changes that will impact the economics of the business and deal making. Among them: the shrinking wealth manager population (at the end of 2015 there were approximately 289K wealth managers down from 339K in 2005), coupled with a new digital battlefield for the DIY and Millennial investor.

How will these trends shape deal-making into 2017 and beyond? Seivert's opening remarks and each subsequent panel session will dive deep to reveal the answers.

"Never has there been a more exciting time, nor one more fraught with peril, for those seeking to buy, sell or merge in the wealth management industry," said Seivert. "As a result, we've been so busy helping our clients that we came very close to putting the DDM Summit on hiatus this year, but upon serious reflection we concluded that in this environment that would be a missed opportunity for the industry. Our partners, the media, and our clients have come to rely on this unique event as an unparalleled forum for sharing ideas and shedding light on the most important wealth management business topics of the day -- and in this, our 5th installment of the event, we are excited to deliver a memorable experience."

Tibergien and Seivert will reprise their high-energy back and forth debate on The Future of Wealth Management, and each panel session will hone in on a topic no serious deal maker can afford to miss.

They are:

"Inside the Negotiations and Structuring of Savvy Buyers and Sellers"

"Dealing for Human Capital: Lift Outs, Breakaways, and Tuck-Ins...Oh My"

"Financing Brilliance: Insights on the Most Powerful, Creative and Successful Deals"

"The Secrets of Technology Disruptors and Their Impact on Deal Making"

Speakers include Michelle Feinstein, Jason Carroll, Theodore Cohen, Megan Carpenter, Tim Welsh, Steve Dunlap, Mark Bruno, Kelli Cruz, Joel Bruckenstein, David Mrazik, Jeff Bischoff and Mike Wunderli -- for the complete list of speakers and panel session participants as well as the full agenda, visit:  
<http://www.dealsanddealmakers.com/>

In this, its 5th installment, and every year, 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)

#### About ECHELON Partners

Founded over 15 years ago, ECHELON Partners ([www.ECHELON-partners.com](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. We believe the keys to successfully serving clients are a deep understanding of the wealth and investment management 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 advisory engagements and valuations, 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 in its 5th installment, to New York City! 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; Capitalizing on Market Cycles and Secular Change.

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, 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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