FIDELITY INSTITUTIONAL WEALTH SERVICES®
Fidelity Learning Exchange

Increasing Firm Value through M&A

Thursday, February 5, 2015

8:00 – 11:45 a.m.
InterContinental Buckhead Atlanta
3315 Peachtree Road NE
Atlanta, GA 30326

Register Now

Add to calendar

Breakfast will be served. Validated parking available.

Learn how to create a mergers & acquisitions strategy that helps meet some of your goals.

Please join Fidelity's Practice Management Consultants and industry M&A experts as they take you through the building blocks of an M&A strategy.

Discussion topics will cover:

- Establishing clear personal and business objectives
- Identifying the right target
- Communicating your value
- Deal structure and valuation

You'll leave this session with a greater understanding of the M&A dynamics in the RIA space and be able to start forming a strategy on how M&A may help you accomplish your business growth objectives.

Featured Speakers:

Rush Benton, Senior Director, Strategic Wealth, CAPTRUST Financial Advisors

Steve Levitt, Managing Director, Co-Founder, Park Sutton Advisors, LLC

David Selig, CEO, Advice Dynamics Partners

Waldemar R. Kohl, CFP®, VP Practice Management & Consulting, Fidelity Institutional Wealth Services

Amanda Scipione, Director Practice Management & Consulting, Fidelity Institutional Wealth Services

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Hosted by:

Tom Valverde, SVP, Fidelity Institutional Wealth Services

Greg Fink, VP, Fidelity Institutional Wealth Services

Krystle Murray, VP, Fidelity Institutional Wealth Services

Darci Toumberlin, VP, Fidelity Institutional Wealth Services

Brian Nietzel, VP, Fidelity Institutional Wealth Services

Ann Caner, VP, Fidelity Institutional Wealth Services

Who Should Attend

This session is tailored for firm owners, principals and executives who are interested in learning more about M&A strategy and best practices.

Agenda:

8:00 a.m.
Breakfast and Registration

8:30 - 10:00 a.m.
Creating an M&A Strategy Part I

10:00 - 10:10 a.m.
Break

10:10 - 11:45 a.m.
Creating an M&A Strategy Part II

Sponsored by: Principal Funds

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