

# 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](#)

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*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.

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## 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<sup>®</sup>, 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 Tumberlin**, VP, Fidelity Institutional Wealth Services

**Brian Nietzel**, VP, Fidelity Institutional Wealth Services

**Ann Caner**, VP, Fidelity Institutional Wealth Services

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### **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.

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### **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**

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