

FIDELITY INSTITUTIONAL WEALTH SERVICES®
Fidelity Learning Exchange

Increasing Firm Value Through Mergers and Acquisitions

Tuesday, June 24, 2014

8:00 a.m. - 2:00 p.m.

The Lambs Club New York
The Club Rooms
132 West 44th Street (btwn 6th Ave and Broadway)
New York, NY 10036

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Breakfast and lunch will be served. Validated parking available.

Featured Speakers:

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

Peter Raimondi, Founder and CEO, Banyan Partners

Paul Lally, President & Co-Founder, Gladstone Associates, LLC

Jim Tennis, President, InCap Group, Inc.

Steven Levitt, Managing Director & Co-Founder, Park Sutton Advisors, LLC

Please join Fidelity's Practice Management Consultants and industry M&A experts as they take you through the evolving landscape succession planning and M&A. You will learn how other advisors have identified opportunities, overcome challenges, and completed successful transactions. Also, hear from Peter Raimondi, Founder and CEO of Banyan Partners, as he shares his personal experience in acquiring several advisory firms in the past year.

Roundtable breakout sessions led by M&A specialists will cover topics such as valuation, post-deal considerations, effective targeting, and deal structure. You'll leave this session with key takeaways on how to prepare your firm to engage in M&A and how it may help you accomplish your business growth objectives.

Hosted by:

Rich Policastro, SVP, New York & Mid-Atlantic Region, Fidelity Institutional Wealth Services

Who Should Attend:

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

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