FIDELITY INSTITUTIONAL WEALTH SERVICES
Fidelity Learning Exchange

Increasing Firm Value through M&A

Tuesday, April 21, 2015
8:00 - 11:30 a.m.
Renaissance Boston Waterfront Hotel
606 Congress Street
Boston, MA 02210

Register Now

Add to calendar

Breakfast will be served. Validated parking available.

Learn how to create a mergers & acquisitions strategy that meets your goals.

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

Discussion topics will cover:

- Establishing clear personal and business objectives
- Identifying the right target
- Communicating your value
- Courtship and structuring the deal

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

Ryan Belanger , Managing Principal, Founder, Claro Advisors, LLC

Frank Kettle, Managing Director, Colchester Partners

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

Waldemar R. Kohl, CFP VP Practice Management & Consulting, Fidelity Investments

Amanda Scipione, Director Practice Management & Consulting, Fidelity Investments

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Hosted by:

Pat Jancsy, Senior Vice President, Northeast Region, Fidelity Investments

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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.

Sponsored by: J.P.Morgan Asset Management

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