



has completed the acquisition of
SULLIVAN & SERWITZ
Multi-Family Office

ECHELON provided the
Management of Sullivan & Serwitz
with:

**Valuation and Sell-Side Advisory
Services**



has completed the acquisition of

OBS FINANCIAL
REGISTERED INVESTMENT ADVISOR

ECHELON provided the
Management of OBS Financial
with:

**Valuation and Sell-Side Advisory
Services**



ECHELON provided the
Management of Concentric Wealth
Management, LLC with:

Buy-Side Advisory Services



ECHELON provided the
Management of Blue Oak Capital,
LLC with:

**Valuation and Financial Advisory
Services**



has agreed to a merger with

NEXUS
STRATEGY

ECHELON provided the
Management of FiComm Partners
and Nexus Strategy, LLC with:

**M&A and Financial Advisory
Services**



ECHELON provided the
Management of Halite Partners
with:

**M&A and Financial Advisory
Services**



has agreed to a transaction with

MISSION CREEK
CAPITAL PARTNERS
ECHELON provided the Management
of Lexington Capital Management
Inc. with:

**M&A and Financial Advisory
Services**



ECHELON provided the
Management of Massey Quick
Simon & Co. with:

**Valuation and Financial Advisory
Services**



OAKWORTH
CAPITAL BANK

ECHELON provided the
Management of Oakworth Capital
Bank with:

M&A Advisory Services



Retirement
Income Solutions

ECHELON provided the
Management of Retirement
Income Solutions with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Rowling &
Associates with:

**Valuation and Financial Advisory
Services**



SIGNATURE *FD*

ECHELON provided the
Management of SignatureFD with:

**Valuation and M&A Advisory
Services**



ECHELON provided the
Management of The Gensler Group
with:

**Valuation and Financial Advisory
Services**



WEALTHSTREAM
ADVISORS, INC.

has completed the acquisition of

Horizon Planning, Inc.

ECHELON provided the
Management of Wealthstream
Advisors, Inc. with:

**Valuation and Buy-Side Advisory
Services**



has completed the acquisition of

BOTSFORD
FINANCIAL GROUP

ECHELON provided the
Management of Merit Financial
Group with:

**Valuation and Buy-Side Advisory
Services**



CENTENNIAL SECURITIES

Investments & Advice

ECHELON provided the Management of Centennial Securities with:

Valuation and Financial Advisory Services



BRIDGEWORTH FINANCIAL

ECHELON provided the Management of Bridgeworth, LLC with:

Valuation and Financial Advisory Services



has agreed to a merger with

William E. Simon & Sons

ECHELON provided the Management of Massey Quick with:

Merger and Financial Advisory Services



has completed the acquisition of:

lakeview FINANCIAL

ECHELON provided the Management of Private Ocean with:

Buy-Side and Financial Advisory Services



JUNXURE

has been sold to

AdvisorEngine

ECHELON provided the Management of Junxure with:
Sell-Side and Financial Advisory Services



has been sold to

MORNINGSTAR

ECHELON provided the Management of Total Rebalance Expert with:

Sell-Side and Financial Advisory Services



COLLINS INVESTMENT GROUP

ECHELON provided the Management of Collins Investment Group with:

Sell-Side and Financial Advisory Services



ECHELON provided the Management of Roof Advisory Group, Inc. with:

Valuation and Financial Advisory Services



has completed the acquisition



ASPIRIANT

ECHELON provided the Management of The Glowacki Group with:

M&A and Sell-Side Advisory Services



BALDWIN BROTHERS
The evolution of investment

ECHELON provided the Management of Baldwin Brothers, Inc. with:

Valuation and Financial Advisory Services



LIVE OAK BANK

ECHELON provided the Management of Live Oak Bank with:

Valuation and Buy-Side Advisory Services



CHAMBERLAIN GROUP
FINANCIAL SERVICES
Value for Generations

ECHELON provided the Management of Chamberlain Group with:

Buy-Side, M&A, and Financial Advisory Services



ECHELON provided the Management of Retirement Protection Group with:

Valuation and M&A Advisory Services



OLD DOMINION
CAPITAL MANAGEMENT, INC.

has been sold to

UNION®

ECHELON provided the Management of Old Dominion Capital Management with:

Valuation and M&A Advisory Services



has been sold to

FOCUS®
FINANCIAL PARTNERS

ECHELON provided the Management of Bordeaux Wealth Advisors with:

Sell-Side and Financial Advisory Services





ECHELON provided the
Management of Lawing Financial
with:

Valuation Advisory Services



ECHELON provided the
Management of Private Ocean, LLC
with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Kinsight, LLC with:

**Valuation, M&A, and Financial
Advisory Services**



ECHELON provided the
Management of Shuster Financial,
LLC with:

**Buy-Side, Valuation, and M&A
Advisory Services**



ECHELON provided the
Management of FCG Advisors LLC
with:

**M&A and Financial Advisory
Services**



ECHELON provided the
Management of Palo Capital with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of The Sterling Group
with:

**M&A and Financial Advisory
Services**



ECHELON provided the
Management of Filbrandt &
Company, Inc. with:

**Valuation and Financial Advisory
Services**



has completed the acquisition of



ECHELON provided the
Management of Symmetry
Partners, LLC with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Signature Estate &
Investment Advisors, LLC with:

**M&A and Sell-Side Advisory
Services**



ECHELON provided the
Management of Vista Capital
Partners, Inc. with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Junxure with:

**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Trust Company of
the South with:

Valuation Advisory Services



ECHELON provided the
Management of Strategic Partners
Investment Advisors, LLC with:

**M&A and Financial Advisory
Services**



ECHELON provided the
Management of Phillips &
Company Securities, Inc. with:

**Valuation and Buy-Side Advisory
Services**





ECHELON provided the Management of Perigon Wealth Management, LLC with:
Valuation and Financial Advisory Services



PARTNERVEST
FINANCIAL GROUP

ECHELON provided the Management of Partnervest Financial Group, LLC with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Partners In Wealth with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Schultz Collins Lawson Chambers, Inc. with:
Valuation Advisory Services



ECHELON provided the Management of Independence Advisors, LLC with:
Valuation and Financial Advisory Services



has agreed to a merger with



ECHELON provided the Management of FJY Financial with:
Valuation, M&A, and Financial Advisory Services



ECHELON provided the Management of Fiduciary Investment Advisors with:
Valuation Advisory Services



ECHELON provided the Management of Emerson Wealth Management, LLC with:
M&A Advisory Services



ECHELON provided the Management of DLK Investment Management, LLC with:
Valuation, M&A, and Financial Advisory Services



ECHELON provided the Management of Laserfiche with:
Valuation, M&A, and Financial Advisory Services



ECHELON provided the Management of Capital Insight Partners, LLC with:
Valuation and Financial Advisory Services



Camelot Wealth Management

ECHELON provided the Management of Camelot Wealth Management with:
Valuation Advisory Services



ECHELON provided the Management of Altair Advisers, LLC with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Windward Capital Management with:
Valuation and Financial Advisory Services



has agreed to be acquired by



ECHELON provided the Management of Wealth Management Group with:
Sell-Side Advisory Services





ECHELON provided the Management of SageView Advisory Group, LLC with:

Valuation and Financial Advisory Services



ECHELON provided the Management of San Antonio Capital & Trust Company, LLC with:

Valuation and Financial Advisory Services



ECHELON provided the Management of Monarch Bay Associates, LLC with:

Financial Advisory Services



ECHELON provided the Management of Metis Global Partners, LLC with:

Valuation and Financial Advisory Services



ECHELON provided the Management of McCutchen Group, LLC with:

Valuation and Financial Advisory Services



ECHELON provided the Management of London Life Insurance Company with:

Financial Advisory Services



ECHELON provided the Management of Lido Advisors, Inc. with:

Valuation & M&A Advisory Services



ECHELON provided the Management of ETF Trends with:

Financial Advisory Services



ECHELON provided the Management of Carlson Capital Management with:

Valuation, M&A, and Financial Advisory Services



BROWNSON, REHMUS & FOXWORTH, INC.
Investment and Financial Advisors

ECHELON provided the Management of Brownson, Rehmus & Foxworth, Inc. with:

Financial Advisory Services



ECHELON provided the Management of Bradford & Marzec, LLC with:

Valuation and M&A Advisory Services



ECHELON provided the Management of Bainco International Investors with:

Valuation and Financial Advisory Services



ECHELON provided the Management of Private Ocean with:

Valuation Advisory Services



ECHELON provided the Management of Opis Companies with:

Valuation, M&A, and Financial Advisory Services



ECHELON provided the Management of Signature Estate & Investment Advisors LLC with:

Financial Advisory Services





ECHELON provided the
Management of Fox, Joss, &
Yankee, LLC with:

Financial Advisory Services



ECHELON provided the
Management of Charles Schwab
with:

Financial Advisory Services



ECHELON provided the
Management of Institutional
Investment Consulting with:

Financial Advisory Services



ECHELON provided the
Management of Miller Russell &
Associates with:

Financial Advisory Services



ECHELON provided the
Management of TD Ameritrade
Institutional with:

Financial Advisory Services



ECHELON provided the
Management of Pacific Capital
Strategies with:

Sell-Side Advisory Services



ECHELON provided the
Management of The McCutchen
Group with:

Financial Advisory Services



ECHELON provided the
Management of Pinney & Scofield
with:

Financial Advisory Services



ECHELON provided the
Management of San Antonio
Capital & Trust Company with:

Financial Advisory Services



ECHELON provided the
Management of Camden Capital
Management, LLC with:

Valuation Advisory Services



ECHELON provided the
Management of Trust Company of
the South with:

Financial Advisory Services



ECHELON provided the
Management of Great-West Life
with:

Financial Advisory Services



ECHELON provided the
Management of Independence
Advisors with:

Financial Advisory Services



ECHELON provided the
Management of HTG Investment
Advisors with:

Financial Advisory Services



ECHELON provided the
Management HTG Investment
Advisors with:

Financial Advisory Services





Select ECHELON Advisory Assignments



ECHELON provided the Management of Dimensional Fund Advisors with:
Valuation and Financial Advisory Services



A subsidiary of Texans Credit Union has been sold to:



ECHELON provided the Management of Texans Credit Union and OBS Holdings with:
M&A Advisory Services



ECHELON provided the Management of SageView Advisory Group with:
M&A Advisory Services



ECHELON provided the Management of Pacific Pointe Advisors with:
M&A Advisory Services



ECHELON provided the Management of Monterey Private Wealth with:
Valuation and M&A Advisory Services



has been sold to:



SPECTRUM
ASSET MANAGEMENT, INC.
ECHELON provided the Management of Harrigan & Howard Financial Advisors with:
Valuation and M&A Advisory Services



ECHELON provided the Management of Fidelity Institutional with:
Financial Advisory Services



ECHELON provided the Management of Altair Advisers, LLC with:
M&A Advisory Services



ECHELON provided the Management of Wealth Management Group, LLP with:
Valuation and M&A Advisory Services



ECHELON provided the Management of Bernzott Capital Advisors with:
Valuation Advisory Services



ECHELON provided the Management of Post Advisory Group, LLC with:
Financial Advisory Services



PACIFIC PORTFOLIO

ECHELON provided the Management of Pacific Wealth Advisors, LLC with:
Valuation Advisory Services



has agreed to a merger with



ECHELON provided the Management of Petersen & Ramistella, Inc. and Willow Ridge Capital Advisors, Inc. with:
M&A Advisory Services



ECHELON provided the Management of OBS Financial Services, Inc. with:
M&A Advisory Services



ECHELON provided the Management of The Enrichment Group with:
Valuation Advisory Services





Select ECHELON Advisory Assignments



ECHELON provided the Management of Wealth Management Network, LLC with:
Valuation Advisory Services



ECHELON provided the Management of Trust Company of the South with:
Valuation Advisory Services



ECHELON provided the Management of Wealthstream Advisors, Inc. with:
M&A Advisory Services



ECHELON provided the Management of FCG Advisors, LLC with:
Financial Advisory Services



Tarpley & Underwood

has agreed to a merger with



ECHELON provided the Management of Tarpley & Underwood Financial Advisors and Windham Brannon Financial Group with:
Financial Advisory Services



ECHELON provided the Management of Texans Credit Union with:
M&A Advisory Services



ECHELON provided the Management of TD Ameritrade Institutional with:
Financial Advisory Services



ECHELON provided the Management of HTG Investment Advisors, Inc. with:
Financial Advisory Services



CAPITAL DIRECTIONS
completed the sale of its division,
Advisors Access to:



ECHELON provided the Management of Capital Directions, LLC with:
Valuation and M&A Advisory Services



CAPITAL DIRECTIONS

ECHELON provided the Management of Capital Directions, LLC with:
Financial Advisory Services



ECHELON provided the Management of The Rainier Group, Inc. with:
M&A Advisory Services



ECHELON provided the Management of Old Dominion Capital Management, Inc. with:
Valuation Advisory Services



ECHELON provided the Management of Dimensional Fund Advisors, Inc. with:
M&A Advisory Services



ECHELON provided the Management of Pacific Capital Strategies, Inc. with:
M&A Advisory Services



ECHELON provided the Management of EP Wealth Advisors, Inc. with:
Financial Advisory Services





LYDIAN®

ECHELON provided the Management of Lydian with:
Financial Advisory Services



ECHELON provided the Management of Niemann Capital Management, Inc. with:
Valuation Advisory Services



ECHELON provided the Management of OBS Financial Services, Inc. with:
M&A Advisory Services



ECHELON provided the Management of Western Pacific Capital Management with:
Financial Advisory Services



ECHELON provided the Management of Wilson Price with:
M&A Advisory Services



ECHELON provided the Management of Bryson Financial Group with:
Financial Advisory Services



ECHELON provided the Management of Loring Ward with:
Financial Advisory Services



ECHELON provided the Management of Wealthstream Advisors, Inc. with:
M&A Advisory Services



ECHELON provided the Management of Wedbush Securities with:
M&A Advisory Services



ECHELON provided the Management of Enright Premier Wealth Advisors, Inc. with:
Financial Advisory Services



ECHELON provided the Management of Levin Wealth Systems, LLC with:
M&A Advisory Services



has agreed to a merger with Robinson, Tighe, Sponcil and Associates
A Registered Investment Advisory Firm
 ECHELON provided the Management of Once Capital Management, LLC with:
Valuation and M&A Advisory Services



ECHELON provided the Management of Jackson Retirement Planning with:
M&A Advisory Services



ECHELON provided the Management of CEG Worldwide with:
Financial Advisory Services



ECHELON provided the Management of Hatton Consulting, Inc. with:
M&A Advisory Services





ECHELON provided the
Management of Wealthstream
Advisors, Inc. with:
Financial Advisory Services



ECHELON provided the
Management of JNB Financial
Advisors with:
M&A Advisory Services



LYDIAN®

ECHELON provided the
Management of Lydian with:
Financial Advisory Services



Robinson, Tighe, Sponcil and Associates
A Registered Investment Advisory Firm

ECHELON provided the
Management of Robinson, Tighe,
Sponcil and Associates with:
Financial Advisory Services



ECHELON provided the
Management of TD Ameritrade
Institutional with:
Financial Advisory Services



STRATHMORE
CAPITAL ADVISORS

ECHELON provided the
Management of Strathmore Capital
Advisors with:
**Valuation and M&A Advisory
Services**



ECHELON provided the
Management of Eastover Capital
Management with:
Valuation Advisory Services



vista | WEALTH | MGMT

ECHELON provided the
Management of Vista Wealth
Management with:
**M&A and Financial Advisory
Services**



RDKStrategies

ECHELON provided the
Management of RDK Strategies
with:
M&A Advisory Services



ECHELON provided the
Management of Winship Park
Asset Management with:
Financial Advisory Services



ECHELON provided the
Management of Tow Financial
Advisors with:
**Valuation and M&A Advisory
Services**



ECHELON provided the
Management of Once Capital
Management, LLC with:
**Valuation and M&A Advisory
Services**



Colonnade
Advisory
Group

ECHELON provided the
Management of Colonnade
Advisory Group with:
**Valuation and M&A Advisory
Services**



BANK OF AMERICA

ECHELON provided the
Management of Bank of America
with:
Financial Advisory Services



**Brenner Wealth
Management**

ECHELON provided the
Management of Brenner Wealth
Management with:
Financial Advisory Services





ECHELON provided the Management of City National Bank with:

Financial Advisory Services



ECHELON provided the Management of OnCubic with:
Valuation and M&A Advisory Services



ECHELON provided the Management of Trovena with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Bailard with:
Valuation and Financial Advisory Services



has agreed to a merger with



ECHELON provided the Management of Leonard Wealth Management with:

Valuation & M&A Advisory Services



ECHELON provided the Management of Avested Interest Wealth Management with:

Valuation and Financial Advisory Services



ECHELON provided the Management of Runyon & Bowes, LLC with:

Valuation and M&A Advisory Services



ECHELON provided the Management of InterOcean Securities with:
Financial Advisory Services



ECHELON provided the Management of CheckFree with:
Financial Advisory Services



ECHELON provided the Management of Wealth Management Group, LLP with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Symmetry Partners with:
Financial Advisory Services



ECHELON provided the Management of Foliodynamix with:
Valuation, Capital Raising, and Financial Advisory Services



ECHELON provided the Management of Foliodynamix with:
Valuation and M&A Advisory Services



ECHELON provided the Management of One Capital Management with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Lydian with:
Financial Advisory Services





ECHELON provided the
Management of Boston Financial
Data Services with:
Financial Advisory Services



ECHELON provided the
Management of Clearbrook &
Shields with:
Financial Advisory Services



ECHELON provided the
Management of Fortigent with:
Financial Advisory Services



ECHELON provided the
Management of Charles Schwab
with:
Financial Advisory Services



ECHELON provided the
Management of Navellier with:
**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of RNC Genter
Capital Management with:
Financial Advisory Services



ECHELON provided the
Management of Buckingham Asset
Management with:
**Valuation and Financial Advisory
Services**



has completed a Private
Placement with



ECHELON provided the
Management of BridgePortfolio
with:
**Valuation, Capital Raising, and
Financial Advisory Services**



ECHELON provided the
Management of Merrill Lynch with:
Financial Advisory Services



ECHELON provided the
Management of PFPC with:
Financial Advisory Services



ECHELON provided the
Management, Board of Directors,
and Shareholders of Finaplex with:
**Valuation and Financial Advisory
Services**



ECHELON provided the
Management of Apex Financial
Partners with:
**Valuation and Financial Advisory
Services**



ECHELON provided the
Management Board of Directors,
and Shareholders of One Capital
Management with:
**Sell-Side, Valuation, and Financial
Advisory Services**



ECHELON provided the
Management of Financial Research
Associates with:
Financial Advisory Services



ECHELON provided the
Management of Wellington West
Capital, Inc. with:
Financial Advisory Services





provided equity ownership to an

Undisclosed Shareholder

ECHELON provided the Management, Board of Directors, and Shareholders of The Investment Counsel Company with:

Valuation and Financial Advisory Services



evaluated a transaction with

Undisclosed Merger Partners

ECHELON provided the Management, Board of Directors, and Shareholders of Global Bridge with:

Valuation, Capital Raising, M&A, and Financial Advisory Services



has completed a

Private Placement

ECHELON provided the Management of BridgePortfolio with:

Valuation, Capital Raising, and Financial Advisory Services



FIRST ASSET ADVISORY SERVICES

ECHELON provided the Management of First Asset Advisory Services with:

Valuation, Capital Raising, and Financial Advisory Services



has agreed to be acquired by



ECHELON provided the Management and Board of Directors of Financial Synergies Advisors with:

Valuation, Sell-Side, and Financial Advisory Services



ECHELON provided the Management of Linsco Private Ledger with:

Financial Advisory Services



has agreed to be acquired by an

Undisclosed Buyer

ECHELON provided the Management of Claremont Financial Group with:

Valuation, Sell-Side, and Financial Advisory Services



ECHELON provided the Management, Board of Directors, and Shareholders of Hollencrest Capital Management with:

Valuation, Buy-Side, and Financial Advisory Services



ECHELON provided the Management of Prudential Financial with:

Financial Advisory Services



ECHELON provided the Management of Mellon Financial Corporation with:

Financial Advisory Services



received a private equity investment from



ECHELON provided the Management, Board of Directors, and Shareholders of Concord Equity Group Advisors with:

Valuation, Capital Raising, and Financial Advisory Services



ECHELON provided the Management of MFS Investment Management with:

Financial Advisory Services



ECHELON provided the Management SEI Investments with:

Financial Advisory Services



ECHELON provided the Management of RNC Genter Capital Management with:

Financial Advisory Services



ECHELON provided the Management, Board of Directors, and Shareholders of Unified Account Technologies with:

Valuation and Financial Advisory Services





ECHELON provided the Management UBS Global Asset Management with:
Valuation and Financial Advisory Services



ECHELON provided the Management of Navellier with:
Financial Advisory Services



has completed a Private Placement with an

Undisclosed Private Equity Investor Group

ECHELON provided the Management and Board of Directors of BridgePortfolio with:
Valuation, Capital Raising, and Financial Advisory Services



ECHELON provided the Management and Board of Directors of BISYS with:
Financial Advisory Services



ECHELON provided the Management of SEI Investments with:
Financial Advisory Services



ECHELON provided the Management of Checkfree Investment Services with:
Financial Advisory Services



Received a private equity investment from an

Undisclosed Private Equity Shareholder

ECHELON provided the Management and Board of Directors of Active Investment Advisors with:
Valuation, Capital Raising, and Financial Advisory Services



ECHELON provided the Management of Fugent with:
Financial Advisory Services



evaluated an offer to be purchased by an

Undisclosed Suitor

ECHELON provided the Management of Brinker Capital with:

Valuation, Negotiation, and Financial Advisory Services



ECHELON provided the Management and Board of Directors of AssetMark Investment Services with:
Valuation and Financial Advisory Services



evaluated the infusion of outside capital from an

Undisclosed Private Equity Investor

ECHELON provided the Management and Board of Directors of Brinker Capital with:
Valuation, Negotiation, and Financial Advisory Services



ECHELON provided the Management of ING Capital management with:
Financial Advisory Services



evaluated a restructuring and private placement involving an

Undisclosed Private Equity Investor Group

ECHELON provided the Management and Board of Directors of Avatar Associates with:

Valuation, Capital Raising, Restructuring, and Financial Advisory Services



has agreed to sell one of its subsidiaries to an

Undisclosed Acquiror

ECHELON provided the Management of Federated Investors with:

Valuation, Capital Raising, Sell-Side, and Financial Advisory Services



has agreed to be acquired by an
Undisclosed Acquiror

ECHELON provided the Management and Board of Directors of Exedo with:

Valuation, Capital Raising, Sell-Side, and Financial Advisory Services

