Silver Oak Securities Expands Succession Resources for Advisors

(PORTLAND, OR – January 21, 2016) – Succession Resource Group, Inc. (SRG), a succession and acquisition consulting firm for advisors is pleased to announce a new strategic alliance with, and development of strategic resources for Silver Oak Securities, Inc., a fast growing regional broker-dealer and Registered Investment Advisor based in Jackson, Tennessee catering to approximately 150 advisors nationwide.

The newly formed alliance will bring the goals of SRG and Silver Oak Securities together by helping Silver Oak Securities' advisors more proactively engage in succession planning using Silver Oak's practice management team combined with SRG's external expertise and resources to ensure comprehensive advice. Silver Oak has also partnered with SRG to develop a Contingency Planning Packet for advisors specifically designed to help ensure all of Silver Oak advisors have a written plan in place in case of their untimely death or disability. The resources include education material to ensure awareness is raised on the important subject as well a comprehensive form agreement so there are actionable steps taken in 2016 to ensure clients are looked after in case something happens to the advisor. Silver Oak chose to work with SRG as an outside expert to ensure advisors had access to neutral industry leading expertise. According to Billy Hopkins, Chief Executive Officer at Silver Oak Securities, succession planning is a major focus of our firm and our industry. We want to make sure that our advisors have the best resources available to protect their largest asset and make sure that their clients' interests are served."

Executive Vice President of SRG, Erik Pahlow said his firm is excited about the alliance with Silver Oak Securities and the development of the new strategic resources as a way to ensure adoption by the advisors because death and disability planning is such a pivotal issue for independent advisors and their clients. Erik went on to say, "Building a valuable practice, developing a long term succession plan or growing through acquisition are all important tools for an advisor – but ensuring there is a plan in place for the advisor's business, clients, employees, and family, in case something sudden happens, is just smart business. Silver Oak understands this isn't just the advisor's problem to solve, and providing a turnkey and no-cost solution will lead to widespread and quick implementation." Silver Oak advisors will begin receiving and be able to access the resources starting in January 2016.

About Silver Oak Securities

Silver Oak Securities, Inc. is an independent, full-service broker dealer and SEC Registered Investment Advisor focused on serving the needs of independent wealth advisors who foster strong, trusted relationships with their clients. Founded in 1999 by Principals with deep investment management and compliance experience spanning 40 years, Silver Oak is based in the heart of the southern U.S. Corporate headquarters are located in Jackson, Tennessee. Silver Oak Securities goal is to help independent advisors deliver world-class client service while maximizing their profit potential.

For more information on Silver Oak Securities visit www.silveroaksecurities.com

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About Succession Resource Group

Succession Resource Group, Inc. is a boutique succession consulting company specialized in helping professional services companies, uniquely positioned to help advisors find and acquire businesses, merge their business, determine the value of and protect their business, and transition their business when the time is right. The consulting projects SRG leads require a unique combination of skills, resources and industry expertise you'll find only at SRG. Our combined decades of experience allow Succession Resource Group to help advisors with deal structuring and negotiating, providing industry specific contracts, tax strategies, compliance, and family and estate planning considerations.

For more information on Succession Resource Group visit www.successionresource.com

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