|Succession Resource Group|

David Grau Jr., MBA

David Grau Jr., MBA is the founder and CEO of Succession Resource Group and is the nation's leading consultant on advisor valuation, acquisition and succession planning for firms. Over the last decade, David has assisted hundreds of advisors and other professionals buy, merge, sell, and craft their transition plan for the sale of their business. Prior to launching SRG, David was well known as one of the premier M&A consultants for a well known succession planning firm to advisors. Prior to this role, David served in the United States Navy.

David is a published author and accomplished speaker on succession planning, financial practice valuation, and death/disability planning for small business owners and has been interviewed and cited in dozens of publications. He is currently one of the leading speakers in the financial services industry on mergers and acquisitions of independently owned financial services firms, as well as valuation strategies and practice continuity issues, with over 200 presentations to his credit. In the past five years, he has spoken at variety of the industry's leading firms, including LPL Financial Services, Wells Fargo, Ameriprise Financial, MetLife, ING, AIG, Fidelity, Jackson National, Prudential, and at many FPA chapters around the country.

David holds a Bachelor's Degree from Portland State University and has a Master's Degree from Willamette University's Atkinson Graduate School of Management. David, his wife Kristen and their son Lincoln are all long time residents of Portland, Oregon but take every opportunity to travel. David enjoys reading, is an avid runner, wine enthusiast, enjoys snow and water sports, loves basketball and regularly volunteers his time in his local community.

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