



FP TRANSITIONS®

Accomplished Industry Experts Join the FP Transitions Team

Lake Oswego, OR | For Immediate Release

[FP Transitions](#) (FPT) — a leading provider of valuation, succession planning, and practice equity growth services in the financial services industry — recently added three new professionals to its roster. Each of these individuals brings extensive industry experience and a valuable perspective to the ever-growing FP Transitions team.

The Lake Oswego-based company welcomes:

Eric Godes, Senior Vice President: Eric joins FPT with more than three decades of experience running wealth management firms. He has continually stayed on the leading-edge, helping Fidelity Investments launch the first-ever home stock trading system and later launching, Kobren Insight Management, one of the nation's first ever Independent Registered Investment Advisors which he grew from start-up to over \$1B in assets under management before selling to E*TRADE Financial. More recently he served as President and Chief Operating Officer of two nationally-recognized RIAs each with over \$1B in assets under management. As part of the FPT Enterprise Consulting Group, Eric offers his extensive experience to not only guide advisors, but also to help them avoid mistakes he's seen in the past. "Having been on the other side of trying to solve problems on my own, it is great to be able to offer the guidance and resources to help owners achieve their goals," he says. "Owners need a peer to talk to through important business decisions. I am excited to work with the FPT team to provide the integrated resources needed to help advisory businesses meet their long-term strategic goals."

Scott Leak CFP®, Senior Consultant: Scott joins FPT after more than two decades with TD Ameritrade where he helped build what became TD Ameritrade Institutional. "At TD Ameritrade, I was a part of a solution that accelerated so many advisors in finding success transitioning to the independent advisory model," he explains. "Now, with FP Transitions, I want to help accelerate what I think is one of the most important trends in our industry: empowering those advisors to build enduring, transferable businesses." Scott will be working with Marcus Hagood who leads the [Equity Management Solutions](#)™ team at FPT. This is a reunion for Scott and Marcus who both started their careers and worked together at TD Ameritrade Institutional.

Jessica Flynn, Communications Director: Jessica joins FPT after nearly a decade with the Financial Planning Association® (FPA®), where she most recently served as the Managing Director of Strategic Partnerships. "We're currently facing a sustainability challenge across this financial services industry, and FP Transitions is tackling the problem by helping to create equity ownership opportunities for the next generation of advisors. I am excited to help advisors build sustainable businesses and work to support this profession as it continues to grow, evolve, and embrace change." She brings valuable insights to both the internal team and all FP Transitions advisors as a fintech and next generation thought leader, driver of meaningful partnerships, and champion of collaboration.

“We are thrilled to have Eric, Scott and Jessica join us to help not only our fast growing, medium-sized advisory clients,” says Brad Bueermann, CEO “But also to have the added expertise that augments the support to our \$1B+ AUM clients as they transition to next generation ownership.”

Eric, Scott, and Jessica join the FP Transitions team of over 55 professionals—including [valuation](#), [business consulting](#), analytics, and legal experts—in delivering services to a broad range of financial advisory firms. This latest addition of experienced talent will help FP Transitions to guide current and future clients toward their strategic goals.

About FP Transitions

FP Transitions is the nation’s leading business consulting firm dedicated to independent wealth advisory businesses. Since 1999, FP Transitions has completed more financial services transactions than any investment banker or business broker in the country. With core services in advisory M&A and enterprise development, FP Transitions provides comprehensive solutions to financial services businesses using a [concierge approach](#). Visit fptransitions.com for more information.