|Succession Resource Group|

Succession Resource Group Expands Team and Focus to Insurance Industry

(PORTLAND, OR – January 27, 2014) – Succession Resource Group, Inc. (SRG) the industry leader providing personalized acquisition and succession solutions to the financial services industry has added Don A. McLaughlin, CLU, CLF, ChFC, MSM to its team of experts. Prior to joining SRG, Don served as Director of Business Development with Principal Financial Group consulting on acquisition, succession, contingency and transition planning for their Career Distribution leaders, advisors and reps nationwide. His deep understanding of the insurance industry and his passion for helping perpetuate businesses has made him a sought after expert. This addition to the SRG team expands the firm's ability to provide thought leadership on succession planning to the insurance industry – a topic on which the entire industry is now focusing.

Leveraging Mr. McLaughlin's background helping hundreds of the industry's top insurance agents and his knowledge of the inner working of insurance companies, SRG will expand its focus in 2014 to support insurance companies and their producers with acquisition, contingency and succession planning. According to David Grau Jr., CEO of Succession Resource Group, "Succession planning has historically been viewed as an analog option – either stay and keep working until you die at your desk or retire and walk away from a business you love. So, it is no surprise that so few advisor and agents have a plan. With the right match between buyer and seller, succession planning can actually be more about growing than going." He went on to say, "The insurance industry has the same growing wave of aging professionals as the financial services industry. Like it or not, succession planning is going to make or break a lot of large companies in the coming years. Don joining our team adds a wealth of knowledge about the insurance industry and will enable SRG to better serve our insurance clients with valuation, contingency planning, acquisition and creating a business perpetuation plan."

> "Succession planning is more than a transaction. It is a transition of trust."
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> - Don McLaughlin

Based on a LIMRA-McKinsey study in 2012, succession planning is an area where most insurance agents, advisors and reps are delinquent. According to the recent study, more than half of agents/advisors retiring in the next 10 years have no succession plan. As the primary distribution arm for insurance companies, the aging sales force combined with a general lack of succession planning will likely have a major impact on sales capacity. The observations are echoed by Don's experiences as well, "The entire insurance industry was built on trust. Few companies have recognized the emotional impact of a successful producer finding a worthy successor and letting go of what they value most. Succession planning is more than a transaction. It is a transition of trust."

Don has over 35 years of insurance and financial services industry experience both in the field and home office and is a major contributor in industry events, study groups, and projects with/for organizations like LIMRA, NAIFA, GAMA, SFSP and NAFDA. Don is an accomplished author and speaker on the topic of succession and contingency planning for agents and financial advisors and has presented at FPA, NAIFA and SFSP state conventions and local chapters across the country and has been a featured speaker at LIMRA's Distribution Conference, LIMRA's Sales Force Succession Planning Seminar, LIMRA's Distribution Leaders Round Table, GAMA International's Partners in Management Growth, Executive Leadership Cabinet and LAMP meetings and was a main platform speaker at LAMP 2012 in Orlando, Florida.

For more information on the SRG team and SRG services, please visit http://www.successionresource.com/ the-srg-team/

About Succession Resource Group

Based in Portland, Oregon, Succession Resource Group, Inc. is a consulting firm committed to helping financial advisors with their acquisition and succession needs. Founded and led by David Grau Jr., MBA, a succession planning consultant for nearly a decade working with financial professionals, Succession Resource Group, Inc. provides turnkey customized acquisition and succession planning solutions to a variety of professional service firms nationwide, helping both individuals as well as providing firm-wide solutions for broker-dealers and custodians. Succession Resource Group, Inc.'s suite of services includes business valuation, contingency planning, business structuring and equity compensation strategies, acquisition/seller search and sale support (including consulting, deal structuring, tax strategies, checklists, transition packet, and comprehensive customizable form contracts), personalized consulting projects and succession planning.

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

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