



WEALTH ADVISOR
INSTITUTE

The Advisors Forum
Creating Measurable Success For All Wealth Planning Professionals

For Immediate Release

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The Wealth Advisor Institute and The Advisors Forum Merge to Form the Nation's Largest Interdisciplinary Organization for Wealth Planning Professionals

Bend, Oregon, Oct. 15, 2008 – The Wealth Advisor Institute (WAI) today announced the completion of its merger negotiations with The Advisors Forum, LLC. The transaction, which will strengthen each organization's respective mission and the value created for its members, received all required approvals from WAI members and its Board of Directors.

WAI is a membership organization of 500 wealth planners, primarily financial advisors. The Advisors Forum is also a membership organization of 500 wealth planners, consisting primarily of estate and business planning attorneys. The merger underscores the importance of multidisciplinary professionals working together as a team when addressing the estate planning needs of clients.

“This merger benefits not only WAI and Advisors Forum members, but more importantly the clients they serve,” said Jonathan Mintz, Executive Director of The Advisors Forum. “Together, the two organizations will be much better able to fulfill their similar missions of fostering collaboration and networking among wealth advisors from multiple disciplines, while creating value for the clients they serve.”

“As we grew as an organization, it became increasingly evident to us that we could better serve WAI members and meet our mission if we partnered with another organization that shared the same mission – particularly if that organization was comprised primarily of centers of influence like attorneys and/or CPAs,” said Keith Gregg, WAI Chairman. “In The Advisors Forum we found that partner.”

Going forward, The Advisors Forum will serve the membership of the Wealth Advisor Institute and provide all educational events, products and services formerly provided by WAI. The Advisors Forum's Jonathan Mintz will continue in his role of Executive Director. The Board Members of Wealth Advisor Institute will continue in an advisory capacity to The Advisors Forum.

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About the Wealth Advisor Institute

The Wealth Advisor Institute (www.wealthai.com) is a professional association dedicated to fostering collaboration and networking among wealth advisors from multiple disciplines.

About The Advisors Forum

The Advisors Forum (www.advisorsforum.com) promotes the interdisciplinary team approach as a best practice approach to estate planning, and delivers the necessary tools, training, and marketing assistance for all wealth planning professionals to generate consistent referral business. The Advisors Forum is a sister company of [WealthCounsel®](#) and [ElderCounsel, LLC](#). For more information, contact Jonathan Mintz at 800-635-5078, ext. #1.