

**David Grau Sr., JD,
President and Founder, FP Transitions, Lake Oswego, Oregon**

David Grau is one of the original founders of FP Transitions and serves as the Company's President. As a former securities regulator (the operative word being "former") and securities attorney, Grau has spent almost half his life in this industry, helping advisors with every facet of their practices and challenging them to plan long-term.

Grau is the author of *Succession Planning for Financial Advisors: Building an Enduring Business* (Wiley & Sons, 2014). He has also written over 85 nationally published articles, white papers and manuals on continuity issues, income perpetuation strategies, mergers and acquisitions, succession planning, tax strategies, and internal ownership tracks. Grau was named one of the most influential people in the profession in an industry survey of financial advisors by *Financial Planning Magazine* and is a nationally recognized expert on succession planning in the financial services industry.

Grau travels a lot. He is one of the nation's leading speakers and instructors on equity management and succession planning issues, practice value and valuation, and long-range strategic exit plans, having delivered over 750 presentations and workshops to date.

Grau is a current member of the Oregon State Bar and a past board member of the Oregon and SW Washington Chapter of the Financial Planning Association. He is a graduate of Purdue University and Northwestern School of Law. Most importantly, Grau is a perennial Diamond Medallion Member with Delta Airlines and, yes, it is all about the miles — almost 2 million to date.