



More than 400 financial professionals come together for Lion Street's virtual roundtable — recording now available

FOR IMMEDIATE RELEASE

AUSTIN, TX – June 9, 2020 – Lion Street continues to be a leader in offering market insights for their Firms and other advisors who provide planning advice to high-net-worth and business clients. This was showcased by a large turnout for their virtual roundtable on June 2 — hundreds of advisors across the country attended from leading financial, accounting and legal firms representing these clients.

The virtual roundtable featured three leading experts and practitioners — Jonathan Blattmachr, Chris Erblich and Bob Keebler — discussing real-life case studies highlighting what planning clients have done during the COVID-19 pandemic. The panelists also discussed how family dynamics during the pandemic have driven wealth transfer and business plans. [The recording is now available.](#)

“Lion Street is constantly finding the best ways to equip our Firms with timely, relevant information and solutions to be successful,” said James Joyce, Executive Vice President of Sales and Marketing for Lion Street. “We encourage our Firms to attend an event with their Trusted Advisors — estate planning attorneys, CPAs, family office advisors and other partners in planning — to learn ways they can help their mutual clients.”

Lion Street usually hosts an in-person conference for their Firms and Trusted Advisors but quickly pivoted to a virtual event due to ongoing travel restrictions. This silver lining allowed Lion Street to expand the event and deliver experts' insights to a broader audience of industry professionals.

“The virtual roundtable was one of the best, most practical discussions we've heard in a long time,” said Hunter Ewing, Co-Founder of Lion Street Firm High Ground Company. “Advisors have received hundreds of invites to different presentations over the last few months. I can only say that if you want to listen to one with serious ‘meat on the bone,’ this is the one to listen to.”

This online event is part of Lion Street's Trusted Advisors Program. Trusted Advisors by Lion Street exists to support and equip Lion Street Owner-Firms and their most Trusted Advisors with relevant industry news, education and topics through events, webinars and a web-based resource center.



About Lion Street— Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides elite independent life insurance and wealth advisory firms access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. Every affiliated financial advisor is a stockholder of Lion Street. Together, Lion Street’s Owner-Firms are strongly committed to building a fiercely independent, yet highly collaborative network of professionals. To learn more about Lion Street, please visit www.lionstreet.com or connect with us on [LinkedIn](#).

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