

Don Bielen

MBA, CFP®, CM&AA | Principal



Don specializes in ownership transitions and succession for successful business owners and affluent individuals. Since 1992, Don has successfully completed in excess of 300 business transition and succession plans for clients throughout the United States. He leads Perkins Business Transition Services and Transaction Advisory Teams, and provides consultation to design and implement advanced planning strategies. He is recognized by his clients and other advisors as a trusted, knowledgeable, organized, and creative leader in his field and community.

Over the past 20 years, Don has been the featured speaker on the topics of Transition and Succession Planning as well as Mergers and Acquisitions at the Austin Family Business Program, Entrepreneurs Organization, YPO, Cal State Fullerton, Stanford University, International RV Dealers Associations, Inc. Magazine, and multiple trade and business associations.

In addition, Don holds his Series 79 investment banking license with FINRA and serves on the Board of Directors for several privately-held companies, as well as frequently volunteering his time to various nonprofit organizations.

Prior to joining Perkins, he was the Director of Business Advisor Services for the Rainier Group, Inc. Don has also held positions as an Operations Manager for a fortune 100 company.

EDUCATION

Masters of Business Administration

University of Oregon

Certified Mergers and Acquisitions Advisor

Alliance for Mergers & Acquisition

College of Financial Planning

CFP® Certification Education Program

Bachelor of Science, Business Finance

University of Montana

PROFESSIONAL & CIVIC AFFILIATIONS

Financial Beginnings USA

Board of Directors & Treasurer

CFP Board

Mentor to aspiring CFP professionals

Ran-Tech Engineering and Aerospace

Board of Advisors

Wilson's NAPA

Board of Advisors

University of Oregon Alumni Association

CONNECT WITH DON

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