



## Don Bielen, MBA, CFP®, CM&AA

### Principal

Don specializes in ownership transitions and business 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 works closely with Perkins' clients and staff to provide direction and 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 15 years, Don has been the featured speaker on the topics of Transition and Succession Planning at the Austin Family Business Program, Cal State Fullerton Center for Family Business, Stanford University Graduate School of Business, International RV Dealers Associations, International Public Relationship Annual Conference, Inc. Magazine's Annual Conference, and multiple trade and business association events.

In addition, Don serves on the Board of Directors for several privately-held companies, and he frequently volunteers his time to various nonprofit organizations throughout Portland.

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 Allstate Insurance Company and Assistant Manager for Montana Merchandising and Grain Merchandiser for Columbia Grain Company.

### EDUCATION

Master of Business Administration

University of Oregon

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 & Finance Committee

Future Business Leaders of America - Lincoln HS

Advisor

CFP Board

Mentor to aspiring CFP professionals

MNOP

Board of Advisors

Wilson's NAPA

Board of Advisors

Alliance of Merger & Acquisition Advisors

University of Oregon Alumni Association

### CONNECT WITH DON

503.221.7545

[dbielen@perkinsaccounting.com](mailto:dbielen@perkinsaccounting.com)

