



For Immediate Release

DeVoe & Company Supports OptiFour in Sale to Creative Planning

San Francisco, November 19, 2019 – DeVoe & Company, a leading consulting firm and investment bank to the RIA industry, represented OptiFour in its sale to Creative Planning Inc (“Creative Planning”). Creative Planning, an RIA managing \$38 billion for clients nationwide, announced today that it acquired OptiFour, a McLean, Virginia-based RIA with approximately \$400 million in assets under management.

"We are excited to join forces with one of the leading wealth management organizations, which shares our commitment to holistic wealth management, as well as a fiduciary commitment to putting clients' interests first," said Mark Cohen, co-Principal of OptiFour. Wes Burnett co-Principal of OptiFour added, "Our clients will benefit from the power of a broader platform, while receiving the same level of intensive service we have always provided. Creative Planning was unmatched in its ability to deliver experience and scale when it comes to offering family office services to high-net-worth individuals."

"We are excited to welcome Mark Cohen, Wes Burnett and the OptiFour team," said Peter Mallouk, CEO of Creative Planning. "Mark and Wes have spent decades building a firm that helps clients in all aspects of their financial lives. In Creative Planning, they have found a partner that shares their vision."

"Wes and Mark were extremely focused on finding their optimal partner," said David DeVoe, Managing Director, DeVoe & Company. "Creative Planning is a world-class organization that will support them in serving their family office and high net worth clients with confidence, even as markets and service models evolve."

DeVoe & Company's team advising OptiFour leadership included Managing Directors, Vic Esclamado and David DeVoe.

About DeVoe & Company

DeVoe & Company is a goal-based consulting firm and investment bank focused exclusively on the wealth management industry. The company's consulting, M&A and valuation services are designed to help RIAs accelerate the achievement of their business goals. For additional information, please visit www.devoeandcompany.com.

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