



For Immediate Release

DeVoe & Company Represented Asset Management Advisors in its Sale to Cresset Asset Management

San Francisco, July 27, 2021– DeVoe & Company, a leading consulting firm and investment bank serving the RIA industry, is honored to have advised Asset Management Advisors, Inc., a boutique family office based in Houston, in its sale to Cresset Asset Management (\$13 billion in assets).

Lynn Mathre, President and Founder, Asset Management Advisors (\$500 million in assets), spent 35 years building the firm. She found a partner to help take the business to the next level. “With Cresset, our clients will have access to a truly holistic array of wealth management and family office services,” said Mathre. Asset Management Advisors specializes in tax-aware wealth management and provides comprehensive financial and tax reporting on client investment portfolios.

With the addition of Asset Management Advisors, Cresset is adding to its footprint in Texas and expanding its tax planning expertise as part of its family office value proposition.

“Lynn and her team will be able to form even deeper relationships with clients by leveraging Cresset’s comprehensive family office services, wealth management and planning services,” said David DeVoe, Founder and CEO, DeVoe & Company.

This was DeVoe & Company’s seventh transaction in 2021.

About DeVoe & Company

DeVoe & Company is an investment bank and goal-based consulting firm focused exclusively on guiding wealth management and investment management companies to a higher level of success. The firm provides M&A, consulting and valuation services to help RIAs accelerate the achievement of their business goals. For more information, visit www.devoeandcompany.com.

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