



For immediate release

DeVoe & Company Represented JBJ Invest in its transaction with Creative Planning

San Francisco, February 15, 2022 – DeVoe & Company, a leading investment bank and consulting company serving the RIA industry, is honored to have represented JBJ Invest, a \$735MM RIA based in Charleston, South Carolina in its transaction with Creative Planning, a \$100 billion enterprise.

JBJ Invest caters to dentists and physicians, providing wealth management, estate planning, and benefit/retirement plan consulting for business owners, their employees, and their families. Mathew Emmert, Managing Principal and owner, has accelerated growth in these niche markets across 40 states and has built on the reputation initially established by Founder Dr. Jim Jackson, a dentist with a passion for investments.

“We are excited to join Creative Planning, whose focus on the dental community, complete with tailored podcasts, websites, 401k plans, and practice valuation services, complements the success we have achieved in this market,” said Mathew Emmert, President and Chief Investment Officer, JBJ Invest. “We are confident that Creative Planning will enable us to deliver enhanced capabilities to our current and future clients.”

“JBJ’s commitment to the attractive dental / medical practice niche is very aligned with our service model for business clients,” said Peter Mallouk, Chief Executive Officer, Creative Planning. “Mathew and the team are doing great work for clients, and we look forward to helping them grow.”

“Our team was thrilled to support JBJ Invest in finding a strategic partner that supported their current situation and longer-term priorities,” said David DeVoe, Founder and CEO, DeVoe & Company. “Creative Planning-JBJ is another powerful combination that will quickly unlock opportunities for the team and their clients.”

This is DeVoe & Company’s second transaction in 2022.

About DeVoe & Company

DeVoe & Company is a goal-based investment bank and 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.

Media Contacts:

David DeVoe
415-813-5066 ext. 1
david.devoe@devoe-co.com

Stacy Orff
415-813-5066 ext. 8
stacy.orff@devoe-co.com