



For immediate release

DeVoe & Company Represented Emery Howard in its Sale to Creative Planning

San Francisco, March 29, 2022– DeVoe & Company, a leading investment bank and consulting company serving the RIA industry, is honored to have represented Emery Howard (\$1.8 billion in AUM) in its sale to Creative Planning, which managed \$134 billion in client assets (as of 12/31/21).

Located in the San Francisco Bay Area, Emery Howard has provided customized wealth management services to high net-worth clients since 1991. With the ability to offload operations, compliance and related functions, the team will focus on expanding their services to existing clients and developing new relationships.

"We wanted to align with a leading enterprise with outstanding investment and planning capabilities and that would provide operational scale to allow our team to focus exclusively on client relationships," said Michael Howard, President, Emery Howard.

"We welcome the Emery Howard team to the group. Their deep, trusted relationships and outstanding service are aligned with our culture," said Peter Mallouk, Chief Executive Officer, Creative Planning. "This relationship also deepens our presence in the attractive San Francisco Bay Area market."

"It was our privilege to support Mike and the team in finding the optimal partner that supports their continued growth and offers the structure for a successful eventual succession for Mike," said David DeVoe, Founder and CEO, DeVoe & Company.

This is DeVoe & Company's third 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.

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