



For immediate release

DeVoe & Company Supports New England Pension Plan Systems in Sale to Edelman Financial Engines

San Francisco, December 14, 2023 – DeVoe & Company, a leading M&A consulting company serving the RIA industry, is honored to have supported New England Pension Plan Systems, LLC (NEPPS) in its sale to Edelman Financial Engines (EFE).

Specializing in the management of 401(k) plans for small and mid-size businesses, NEPPS is a \$1.5B New England-based retirement plan advisor and RIA. The organization has experienced rapid growth since its founding in 1991 and was seeking to partner with a larger organization with established infrastructure and resources to support additional capabilities for its growing client base.

“EFE’s retirement plan support infrastructure combined with our institutional, conflict-free platform provides a unique combination to enable expansion that will benefit our existing and future clients,” said Sergio A. DeCurtis, Founder and CEO of New England Pension Plan Systems.

“We are excited to officially welcome the NEPPS team and their clients to our firm,” said Suzanne van Staveren, Executive Vice President, Chief Financial Officer and Chief Operating Officer at Edelman Financial Engines. “There is a strong alignment between NEPPS and EFE, both in culture and values as well as the commitment to supporting small businesses and investors with their retirement and wealth planning needs.”

“With a leading workplace retirement franchise in the RIA space, EFE continues to expand into the small and medium-size plan market,” said David DeVoe, Founder and CEO of DeVoe & Company. “The NEPPS acquisition bolsters an already growing area of EFE’s business, benefitting current and future clients of both firms.”

This is DeVoe & Company’s eleventh transaction of 2023.

About DeVoe & Company

DeVoe & Company is a goal-based investment bank and consulting firm focused exclusively on the wealth management industry. The company’s consulting, M&A and valuation services provide 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