



For immediate release

DeVoe & Company Advises Price Wealth Management on its Sale to Mesirow

San Francisco, CA – September 4, 2024 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported Price Wealth Management, an established RIA firm based in Stuart, Florida on its sale to Mesirow, an independent, employee-owned financial services firm.

In this transaction, Craig Price, CFP®, CTFA becomes a Mesirow Wealth Advisor, establishing a local Mesirow Wealth Management presence for high-net-worth individuals and families in Southeast Florida. This transaction builds upon Mesirow's significant existing footprint in the area, which also includes offices in Miami and Boca Raton.

"We are excited to join Mesirow Wealth Management, said Craig Price, "and know that our business philosophy and personal values are well aligned with the company's culture. We look forward to deepening the presence of Mesirow Wealth Management in Florida and continuing to advise the families we have long served."

With the addition of Craig Price, CFP®, CTFA, and Nancy Zehr, CTFA, Senior Client Relationship Specialist, Mesirow clients and prospects in Southeast Florida gain proximity to an experienced Wealth Advisor with firsthand understanding of planning considerations specific to the Florida region and focus on comprehensive financial planning. Price and his team will gain access to a broader range of investment research resources and the ability to grow their practice backed by Mesirow's strong resources and reputation.

"This transaction aligns with our focus on serving a growing base of wealth management clients, advancing the firm's footprint in Florida and the regional Southeast, and combining ongoing organic growth with strategic acquisitions in the wealth space," said Brian Price, CEO of Mesirow Wealth Management.

"We are delighted to have helped another client find their ideal partner." said David DeVoe, Founder and CEO of DeVoe & Company. "This strategic combination ensures Price Wealth Management clients will continue to receive top-notch service while also benefiting from an expanded set of capabilities. It is an exciting new development that will unlock new opportunities for both the team and their clients."

This is DeVoe & Company's eighth transaction of 2024.

About DeVoe & Company

DeVoe & Company is a goal-based investment bank and consulting firm focused exclusively on the wealth management industry. Recognized as a leading advisor to the RIA community, DeVoe & Company has completed over 900 engagements since inception. The firm's

consulting, M&A and valuation services empower RIAs to accelerate the achievement of their business objectives. For more information, visit www.devoeandcompany.com.

Media Contacts:

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

Jennifer Sransky
415-813-5066 ext. 8
jennifer.sransky@devoe-co.com