For Immediate Release

Credent Wealth Management and CPF Texas Merge

Auburn, IN and Plano, TX, October 29, 2018 – DeVoe & Company, a leading investment bank serving the RIA industry, is pleased to have served as financial advisor to Credent Wealth Management and CPF Texas in their merger. Together, the company will maintain the Credent Wealth Management name and will serve clients with over $630 million in assets.

“CPF Texas is a great advisory firm in the very attractive Texas market,” said David Hefty, CEO of Credent Wealth Management, “With this merger, we continue to build scale and capabilities that will allow us to serve clients excellently and to compete in our industry that is consolidating significantly. We are a great partner option for advisors who value an ensemble model leveraging best practices across the firm.”

“We are excited about the opportunities for continued growth as we combine with Credent. Their platform will give us efficiencies and the ability to enter our next stage of growth serving clients,” said Mark Schupbach, CEO of CPF Texas. ”Having already collaborated on our back-office and investments platform, the fit and complementary nature of our firms was already apparent. Joining with David Hefty, John Knowlton and the Credent team seemed natural.”

“While Mark Schupbach may have been looking for succession opportunities, these two firms fit together on a number of levels,” said David DeVoe, Managing Partner at DeVoe & Company. “The combined firm has even greater scale, and as they continue to look to M&A, the breadth of capabilities they bring to client service will continue to increase.”

DeVoe & Company’s senior deal team included Vic Esclamado and David DeVoe.

About DeVoe & Company
DeVoe & Company is a leading strategic advisor to RIAs, offering consulting, investment banking and valuation services. DeVoe & Company’s team of experts includes two classically-trained strategy consultants and three former heads of $1B+ RIAs. With over 400 engagements executed during the last several years, the company provides the most comprehensive suite of services for wealth management companies.

About Credent Wealth Management
Credent Wealth Management offers comprehensive financial services to individual investors. Credent differentiates itself through its team of exemplary professionals who are passionate about the work they do delivering an exemplary client experience, and who carry over 150 years of combined financial experience. Credent Wealth Management is a partner of CX Institutional.

About CX Institutional
CX Institutional is a leading investment management firm and a registered investment advisory firm. The CX Institutional Partnership complements Credent Wealth Management’s core beliefs, with a focus on the “Customer eXperience” that is designed to match service level to customer expectations. The CX Institutional Investment Management Approach includes a multiple strategy platform that operates on three main pillars aimed at objectivity, strategy diversification, and on-going education. By employing a non-emotional and quantitative process, the CX

Institutional platform provides a global approach to asset selection and remains sensitive to the total cost of investing.

Securities offered through LPL Financial, Member FINRA/SIPC. Investment Advice offered through CX Institutional, a registered investment advisor. CX Institutional and Credent Wealth Management are separate entities from LPL Financial.

For additional information, please visit www.devoeandcompany.com.

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