For immediate release

DeVoe & Company Advises Wacker Wealth Partners on its Sale to EP Wealth Advisors

San Francisco, CA – April 2, 2024 − DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported Wacker Wealth Partners, LLC (“Wacker”) a registered investment advisor with nearly $1.2 billion in AUM in its sale to EP Wealth Advisors, a leading independent registered investment adviser with $21.4 billion in assets.

Wacker Wealth Partners, located in San Luis Obispo, CA, was founded to provide clients with a trusted fiduciary who helps them achieve long-term financial goals by establishing deep relationships built on an understanding of what is most important. The firm, which serves the growing San Luis Obispo and Central Coast region in a wide array of industries, has been an integral member of the community for more than 35 years.

“We’ve experienced significant growth, which is a testament to our team and the trust we’ve built within the community,” said Ryan Caldwell, CEO and Wealth Advisor at Wacker. “Partnering with EP allows us to continue serving this growing area with the same focus and commitment we have for decades.” Wacker’s Ryan Caldwell will become EP’s Regional Director for Central California, while President and COO Bryan Krill will become Associate Regional Director. In all, 22 members of the Wacker team will join EP Wealth.

“The Wacker team places client service above all other goals, which is just one of the many attributes we share,” said Ryan Parker, CEO of EP Wealth Advisors. “You can see their commitment in many ways, including their extensive involvement in community organizations throughout the Central Coast. Expanding our presence in this important market was a factor in partnering, but it is the way Wacker shows up for their clients, team members and others that sets them apart.”

“The alignment across vision, values, and client service between the two organizations was immediately apparent,” said David DeVoe, Founder and CEO of DeVoe & Company. “The strategic power of the combination will benefit both clients and staff.”

This is DeVoe & Company’s third transaction of 2024.

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.

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