



For immediate release

DeVoe & Company Supports Bridgeworth Wealth Management in its Sale to Savant Wealth Management

San Francisco, November 16, 2023 – DeVoe & Company, a leading M&A consulting company serving the RIA industry, is honored to have supported Bridgeworth Wealth Management in its transition to Savant Wealth Management, a \$20.9B RIA. Bridgeworth, based in Birmingham, Alabama, has \$2.2B in assets. Since its founding in 2008, financial planning has been the cornerstone of how it serves clients.

“Partnering with Savant fits ideally into the trajectory of our strategic plan,” said DeLynn Zell, Founder and CEO of Bridgeworth. “Our desire is to offer clients industry-leading, client-facing technology and expanded services such as family office resources, including tax preparation services. Savant delivers in all these areas and more.”

“We are excited to welcome the Bridgeworth team to Savant,” said Brent Brodeski, CEO and Founder, Savant. “We were instantly struck by a strong alignment around culture, both in terms of shared values and the fiduciary care delivered to clients. Both of our teams will benefit from coming together.”

“DeVoe & Company was honored to support DeLynn and the Bridgeworth team in finding their optimal long-term partner and home,” said David DeVoe, Founder and CEO, DeVoe & Company. “Bridgeworth’s clients will continue to receive world-class service while benefitting from an expanded set of capabilities, including estate planning, tax services, and access to alternative investments.”

This is DeVoe & Company’s ninth 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.

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