



**For immediate release**

## **DeVoe & Company Advises Daniels + Tansey in its Sale to Creative Planning**

San Francisco, November 28, 2023 – DeVoe & Company, a leading M&A consulting company serving the RIA industry, is honored to have supported Daniels + Tansey (\$600MM in AUM) in its transition to Creative Planning.

Based in Delaware, Daniels + Tansey has 40+ years of experience delivering integrated wealth solutions to an established client based, including many multi-generation families. Clients are served by a multi-disciplinary team or 'ensemble' model, providing financial advisory, tax planning, and investment management.

"We were seeking a partner with unmatched capabilities for clients, like-minded values, and commitment to service excellence," said Chris Daniels, Managing Partner, Daniels + Tansey. "We're excited about what our partnership with Creative Planning brings to our business and especially our clients."

"We are delighted to welcome the accomplished Daniels + Tansey team into the Creative Planning family. The D+T team has spent decades building deep client relationships that are strengthened by the delivery of comprehensive wealth management," said Peter Mallouk, Chief Executive Officer, Creative Planning.

"Our team was thrilled to support Daniels + Tansey in finding their optimal partner," said David DeVoe, Founder and CEO, DeVoe & Company. "Creative Planning will bolster their approach to serving multi-generational families and attracting additional high-net-worth clients."

This is DeVoe & Company's tenth 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](http://www.devoeandcompany.com).

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