



**For Immediate Release**

## **DeVoe & Company Advised Future Benefits in its Transaction with OneDigital**

San Francisco, May 4, 2021 – DeVoe & Company, a leading investment bank and consulting firm serving the RIA industry, is honored to have advised Future Benefits Inc. (\$1B) in its sale. After the close of the transaction, Future Benefits will join OneDigital Investment Advisors, the RIA and a wholly owned subsidiary of OneDigital, a leading health, retirement, and HR advisory firm for employers of all sizes. This is DeVoe & Company's fifth transaction in four months.

Future Benefits, which was founded in 1987, has utilized the OneDigital RIA for support services for the last year and a half. Future Benefits specializes in analyzing outside money managers and no-load mutual funds, focusing on independence, transparency, and minimizing transaction costs. It serves corporate retirement plans, individuals, and endowments.

"Joining OneDigital was a natural next step for Future Benefits," said Kevin Grenham, President and Chief Operating Officer of Future Benefits. "Our existing relationship revealed just how closely our culture, client commitment, and beliefs aligned."

Upon joining OneDigital, Future Benefits will maintain its operation in Cheshire, Connecticut, and provide services under the RIA of OneDigital Investment Advisors. "We are excited to welcome the Future Benefits team. They will benefit from greater access to technology and resources and have more time to serve their clients," said Vince Morris, President, OneDigital Retirement + Wealth.

"It was our privilege to support Kevin, Bill, Tom and the Future Benefits team to bring their firm to the market and find the best strategic partner. OneDigital brings a breadth of services for retirement plan clients that will accelerate growth for the Future Benefits business," said David DeVoe, Founder and CEO, DeVoe & Company.

### **About DeVoe & Company**

DeVoe & Company is a leading investment bank and consulting firm focused exclusively on guiding wealth management and investment management companies to a higher level of success. The firm provides M&A, consulting and valuation services to help RIAs accelerate the achievement of their business goals. For more information, visit [www.devoeandcompany.com](http://www.devoeandcompany.com).

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