



For immediate release

DeVoe & Company Advised Kistler-Tiffany in its Sale to Creative Planning

San Francisco, October 3, 2023 – DeVoe & Company, a leading M&A consulting company serving the RIA industry, is honored to have supported Kistler-Tiffany Advisors (an RIA managing \$1.1 billion in AUM) in its sale to Creative Planning.

Kistler-Tiffany, based in Berwyn, Pennsylvania, has built a strong base of high-net-worth clients over its nearly 50-year history. The firm's advisors provide clients with advanced estate planning and business succession planning that crosses generations for the families it serves.

"We are excited to join a leading enterprise with extensive services and capabilities that will not only expand how we serve our longstanding clients but also provide operational benefits for our team," said Michael Conner, Managing Partner, Kistler-Tiffany.

"Kistler-Tiffany is unrivaled in terms of the deep, trusted relationships it has built over five decades. They have multi-generational relationships and have excelled in legacy and estate planning," said Peter Mallouk, Chief Executive Officer, Creative Planning.

Andrew Reder, Managing Partner, Kistler-Tiffany, added, "This partnership will further enable our delivery of advanced business succession and multi-generational planning, bolstered with additional resources from Creative Planning."

"The Kistler-Tiffany team has demonstrated a successful track record of organic growth. We expect the trajectory to accelerate based on the leverage from Creative Planning's infrastructure," said David DeVoe, Founder and CEO, DeVoe & Company.

This is DeVoe & Company's eighth 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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