



For Immediate Release

DeVoe & Company Advised WEALTHSTONE ADVISORS in its Merger with Sequoia Financial Group

San Francisco, April 22, 2021 – DeVoe & Company, a leading investment bank and consulting firm serving the RIA industry, is honored to have advised WEALTHSTONE ADVISORS (\$1.4B) on valuation and strategy in its merger into Sequoia Financial Group. This is DeVoe & Company's fourth announced transaction in 2021.

The combined organization, which will operate under the Sequoia name, will oversee more than \$7 billion in assets and will have approximately 110 employees. WEALTHSTONE principals Jim Wyland, Norm Cook, Brian Stertz, and Jack Zhang will become shareholders of Sequoia. Both firms are based in Ohio.

"The merger strengthens Sequoia's position as one of the leading wealth management organizations in the Midwest," said David DeVoe, Founder and CEO, DeVoe & Company. "Current and future clients will benefit from a broader suite of services and investment options delivered by a combined organization of greater scale."

More information about the transaction can be found [here](#).

About DeVoe & Company

DeVoe & Company is an 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.

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