



For Immediate Release

**DeVoe & Company Adds Former Edelman President as Special Advisor:
Ed Moore to Support Large/Enterprise RIAs with M&A**

San Francisco, September 9, 2021– DeVoe & Company, a leading consulting firm and investment bank serving the RIA industry, is honored to add Ed Moore to its growing team of consulting and investment banking professionals. He joins our esteemed group of Masters Coaches and will work with leaders of large RIAs. Specifically, he will consult with leaders of \$1B to \$10B+ RIAs, primarily providing M&A guidance.

Over his 30-year career at Edelman, Ed helped grow Edelman from six people to into a \$230-billion enterprise with 1.1 million clients and 1,400 employees. During his tenure, he led the firm's organic growth from one office to 45 offices with 150 planners from coast to coast. He also oversaw the large-scale merger of Edelman Financial Services and Financial Engines.

"I'm honored to have Ed join forces with DeVoe & Company. He has done it all: Buy, sell, merge, debt, private equity, succession, publicly-traded company," said David DeVoe, Founder and CEO, DeVoe & Company. "Ed's experience leading the largest RIA in the country through massive growth will lend new insight that we can share with our clients."

"Running a successful enterprise RIA has become increasingly complex. I'm excited to work with advisors who can benefit from my experiences driving organic and inorganic growth," said Ed Moore, Special Advisor, DeVoe & Company.

Ed started his career with Waddell & Reed as a financial advisor. Ed has been a CFP® professional since 1991 and currently serves on the Board of Directors for the Certified Financial Planner Board of Standards, Inc.

Ed graduated from Virginia Polytechnic Institute and State University with a Bachelor of Science in Industrial Engineering and Operations Research.

"The DeVoe & Company team of 15 professionals with over 350 years of collective industry experience is unrivaled among industry consulting firms," said DeVoe. "We help RIAs run better businesses and back that up with the tremendous experience of our rock star team."

Ed joins Tim Kochis, Peggy Ruhlin and Jane Williams in the Special Advisor role, providing one-on-one coaching to RIA leaders.

About DeVoe & Company

DeVoe & Company is a goal-based consulting firm and investment bank 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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