



**For immediate release**

## **DeVoe & Company Advised Jurika, Mills & Keifer in Joining Cerity Partners**

San Francisco, May 4, 2023– DeVoe & Company, a leading strategy and M&A consulting company serving the RIA industry, is honored to have supported Jurika, Mills & Keifer in its merger with Cerity Partners.

Based in the San Francisco Bay Area, Jurika, Mills & Keifer serves ultra-high net-worth individuals and families. As of the time of transaction, the investment management firm had approximately \$300MM in assets under management. Cerity Partners is a nationally recognized independent wealth management firm serving affluent individuals, families, businesses, and non-profit organizations throughout the U.S.

“We were seeking a firm that could help us expand our wealth management capabilities with respect to tax, trust and estate planning, executive compensation, insurance, and philanthropy. We found that and much more, along with a true culture of partnership with Cerity Partners,” said Karl Mills, President and Chief Investment Officer, Jurika, Mills & Keifer.

“We are excited to welcome Karl Mills, Mikel Keifer, and their colleagues, to our Cerity Partners family. They share our values, commitment to serving the best interests of our clients, colleagues, and communities, and excitement about building an enduring partnership,” said Claire O’Keefe, Partner and Head of Partner Development, Cerity Partners.

“We are delighted to have helped another client find their very best partner. This strategic combination will enable Jurika, Mills & Keifer to maintain their excellent client service while providing current and future clients with a broader set of capabilities,” said David DeVoe, Founder and CEO, DeVoe & Company.

This is DeVoe & Company’s third transaction in 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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