



For immediate release

DeVoe & Company Advises Equius Partners in Joining Wealth Enhancement Group

San Francisco, March 29, 2023 – DeVoe & Company, a leading strategy and M&A consulting company serving the RIA industry, is honored to have supported Equius Partners in its decision to join forces with [Wealth Enhancement Group](#).

Equius, founded by Jeff Troutner and Phil Jonckheer in 1993, is a recognized pioneer in asset class investing. Based in Novato, CA, Equius manages more than \$1 billion in client assets.

Five years ago, the founders transitioned the firm to a next-generation advisor team that is fully committed to preserving and enhancing the benefits of asset class investing for current and future clients. "We have always had a disciplined investment approach which is still at the heart of our service. Our team works hard to share investment knowledge and instill confidence within our clients," said founder Jeff Troutner.

After building a strong second-gen team and successfully transitioning client relationships, the founders ultimately decided that joining a larger partner would be the optimal solution for their clients and their team of seven advisors and five support staff, led by CEO Thomas (TJ) Troutner.

"We went through an exhaustive search of potential partners, and Wealth Enhancement Group checked all the right boxes," said TJ Troutner. "It was important that we'd be able to maintain our investment process and client service approach, while also having access to more services for existing and future clients. We are excited about bringing Wealth Enhancement Group's broader capabilities such as extensive financial planning resources, tax services and estate planning experts to our clients."

Jeff Dekko, Chief Executive Officer of Wealth Enhancement Group, said, "Equius has exceptional dedication to delivering world-class asset class investing to their long-term client relationships. Under the new partnership, Equius advisors and their support teams can concentrate exclusively on serving clients."

"This partnership offers considerable advantages, short and long-term, to both parties," said David DeVoe, Founder and CEO, DeVoe & Company. "Wealth Enhancement Group benefits from the Equius team's deep insights in asset class investing. Equius gains expanded resources and opportunities for the team and their clients."

About DeVoe & Company

DeVoe & Company is a goal-based 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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