



For Immediate Release

DeVoe & Company Introduces Coaching Platform for RIAs *Offering Advisors More Ways to Optimize their Businesses*

San Francisco, April 2, 2020 – DeVoe & Company, a leading consulting firm and investment bank to the RIA industry, announces the introduction of a revolutionary, comprehensive coaching platform designed to help RIAs accelerate growth and run better businesses.

The DeVoe Coaching Platform, which includes the *Masters Program* and *Accelerators*, provides a range of options for advisors to receive support based on their needs and engagement style. The programs deliver expert guidance for managing through today's rapidly evolving business environment.

"Now more than ever, RIA leaders need a trusted and guiding hand to help them navigate their businesses through turbulent waters," said David DeVoe, Managing Director at DeVoe & Company. "Through our Coaching Platform, advisors can access former heads of leading RIAs who have managed firm through markets like 2008."

"Just as elite athletes hire coaches to take their game to the next level, today's business leaders know that an experienced, trusted partner can accelerate the achievement of their goals," said DeVoe. "Our platform combines the wisdom of respected industry veterans with the intellectual capital DeVoe & Company has built through deeply involved engagements with over 500 advisors."

The new platform allows us to deliver a coaching *experience* – with expertise, guidance and tools – not previously available to the RIA industry.

DeVoe Masters Program

In this industry-tailored coaching program, RIA leaders will work closely on their businesses with esteemed former RIA CEOs. *Masters Program* Coaches will help already successful advisors break through to new levels of success, as well as make complex decisions in today's rapidly evolving environment.

"As they say, 'it can be lonely at the top'," said DeVoe. "You can now benefit from a regular meeting with a thought-partner who has sat in your chair and conquered similar challenges."

We are honored to announce that we have expanded the DeVoe & Company team to include several of the most influential leaders in the industry as Special Advisors. Along with our team of seasoned Managing Directors, these Special Advisors will support clients in a coaching capacity:

- Tim Kochis, former CEO and Chairman, Aspiriant; Co-Founder, Kochis Fitz
- Peggy Ruhlin, Chair of the Board of Directors, Budros, Ruhlin & Roe, Inc.
- Jane Williams, Chairman and Co-Founder, Sand Hill Global Advisors

DeVoe Accelerators

The *DeVoe & Company Accelerators* are new multi-faceted, integrated programs designed to help advisors take their businesses to the next level of performance. Members will work on specific business disciplines or themes through a series of monthly webinar sessions, tailored tools, monthly coaching sessions, and in-person meetings. Given today's environment, our first *Accelerator* focuses on *Managing Your RIA Through the Crisis*. Advisors can also join *Accelerators* that will launch later this year, such as *Optimizing Your Firm's Value* and *Harnessing Human Capital*.

"The *Accelerator* program, essentially a virtual study group on steroids, is a new way to take a comprehensive and integrated approach to optimize a specific, critical area within RIA businesses," said DeVoe. "Program members can benefit from the power of the intellectual capital of DeVoe & Company, their DeVoe Managing Director as coach, and the collective insight of a peer group – without leaving their home or office."

More information is available about the DeVoe Coaching Platform on [our website](#).

About DeVoe & Company

DeVoe & Company is a goal-based consulting firm and investment bank focused exclusively on the wealth management industry. The company's consulting, M&A and valuation services are designed to help RIAs accelerate the achievement of their business goals. For additional information, please visit www.devoeandcompany.com.

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