



**For immediate release**

## **DeVoe & Company Expands to 18 Team Members**

San Francisco, January 11, 2022 – DeVoe & Company, a leading consulting firm and investment bank serving the RIA industry, recently added five more rock stars to its team to meet the growing demand in the marketplace. Now 18 people strong with 350+ years of collective industry experience, DeVoe & Company has the most experienced consulting and investment banking team serving RIAs.

“It’s an honor and a pleasure to work with such brilliant team members,” said David DeVoe, Founder and CEO, DeVoe & Company. “Talent is paramount to consulting – our team’s seasoned backgrounds are a key differentiator. We are a learning organization, so each engagement makes us smarter and better able to serve the next client.”

Recent additions:

**Doug Johnson** joined as a Managing Director with more than 20 years of senior-level RIA experience. As the former COO at Parcion Private Wealth (~\$2B) in Seattle, he oversaw an 80% AUM growth trajectory in the first 12 months of his tenure. Previously, Doug spent six years as a Senior Consultant at The Ensemble Practice, where he supported RIAs and broker-dealers with business consulting and strategic planning. Earlier in his career, he was COO of Columbia Pacific Capital Management and Lakeside Capital Management.

**Bob Ciullo** joined as a Managing Director to lead the company’s new *GrowthBuilder* program. Bob was previously the Chief Advisory Officer for two multi-billion-dollar RIAs. At *Sullivan, Bruyette, Speros & Blayney* and *PagnatoKarp*, Bob oversaw their teams of Client Advisors, teaching them how to grow their client practices through client and COI referrals. Earlier in his career, Bob worked with over 250 RIAs as a Managing Director at Schwab Advisor Services.

**Matt Tancredi** and **Preston Deen** joined as Associates. Matt has over three years in the financial services industry, including Bank of America, Raymond James, and two boutique M&A boutiques. Preston has over three years of experience in financial modeling, valuation, and client engagement work. Most recently, he was a Senior Associate in the valuation group at RSM.

**Breanna Smith** joined the team as Executive Assistant to David DeVoe, after previous roles at Sony, Air 360 Helicopters, and the US Marine Corps.

The company has also developed clear career paths for team members and is proud to reward two team members with promotions in the last quarter.

For additional background on the DeVoe & Company team, [visit the website](#).

**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](http://www.devoeandcompany.com).

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