



**For immediate release**

## **DeVoe & Company Represented Heritage Way Advisors in its Sale to Creative Planning**

San Francisco, April 8, 2022– DeVoe & Company, a leading investment bank and consulting company serving the RIA industry, is honored to have represented Heritage Way Advisors (\$440MM) in its sale to Creative Planning, which advises on \$225 billion in assets (as of 12/31/21).

Based in Illinois, Heritage Way Advisors is a boutique wealth management firm serving clients in more than 20 states. “We were seeking an enterprise-scale partner that would provide greater resources, solidify our succession planning, and offer access to expanded industry expertise for our next generation team,” said Gary Ollmann, President and Managing Partner, Heritage Way. “The holistic planning approach at Creative Planning is a natural fit, and their extensive support systems ensure we can take care of our clients and families for years to come.”

“We are excited to bring Heritage Way into our fold,” said Peter Mallouk, Chief Executive Officer, Creative Planning. “Heritage Way has a like-minded client service approach, including a dedication and sophistication to using technology to enhance the client experience.”

“Supporting Gary and the team in finding the right partner involved focusing on both the technical aspects and the cultural fit,” said David DeVoe, Founder and CEO, DeVoe & Company. “We look forward to watching the Heritage Way team build continued success as they become part of the Creative Planning organization.”

This is DeVoe & Company’s fifth transaction in 2022.

### **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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