



For immediate release

DeVoe & Company Represented Mindful Money in its Sale to EP Wealth Advisors

San Francisco, January 4, 2022– DeVoe & Company, a leading investment bank and consulting company serving the RIA industry, is honored to have represented Mindful Money (\$346MM) in its sale to EP Wealth Advisors, a \$13 billion organization.

Based in Berkeley, California, Mindful Money, further expands EP Wealth’s presence in the San Francisco Bay Area. Founded by Jonathan DeYoe, AIF® CPWA® in 2001, Mindful Money offers independent financial advice and unparalleled customer service in a warm, welcoming and client-centered environment. The firm specializes in life planning, client education and financial planning.

As with all transactions, finding the right cultural fit was important to DeYoe who was also looking for a firm that would be able to offer broader resources and allow him to focus more exclusively on deepening client relationships.

“We are thrilled to partner with EP Wealth in pursuit of our mission to educate our clients and help them develop a better relationship with money,” said DeYoe, President of Mindful Money.

“Jonathan’s team is a natural culture fit,” said Patrick Goshtigian, President and CEO, EP Wealth. “The Mindful Money team’s unique financial planning process focused on health and wealth and deep ties to the local community are strong attributes that we seek to expand across the EP Wealth network.”

“We are excited that Jonathan and team have found a new home in EP Wealth,” said David DeVoe, Founder and CEO, DeVoe & Company. “EP Wealth’s expansive wealth management capabilities will support Mindful Money in this transition and provide expanding capabilities for their clients for years to come.”

This is DeVoe & Company’s first transaction of 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.

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