



For immediate release

DeVoe & Company Represented Resource Management in its Transition to Creative Planning

San Francisco, April 5, 2022– DeVoe & Company, a leading investment bank and consulting company serving the RIA industry, is honored to have supported Resource Management LLC, a \$1.9 billion RIA, in its transition to Creative Planning, which advises on \$225 billion in assets (as of 12/31/21).

Resource Management, a Louisiana-based RIA, offers sophisticated financial planning and wealth advisory services to high net worth clients and their families. The founder is a nationally recognized pioneer in the field of financial planning for families, including multi-generational wealth and legacy planning.

“We are excited to join one of the leading wealth management organizations, which shares our commitment to comprehensive planning and wealth management,” said Randy Waesche, President and CEO, Resource Management. “We were seeking a partner with a similar commitment to offering generational wealth transfer consulting to their high net worth and business clients. Creative Planning more than meets that call.”

“The Resource Management team is a terrific addition to our organization,” said Peter Mallouk, Chief Executive Officer, Creative Planning. “Randy and his senior team have spent decades building deep relationships with clients and a sophisticated client experience. In Creative Planning, they have found a partner that shares their vision and philosophy.”

“Our team was thrilled to support Resource Management in finding their optimal partner,” said David DeVoe, Founder and CEO, DeVoe & Company. “Creative Planning will support them in serving multi-generational families and other high net worth clients with confidence.”

This is DeVoe & Company's fourth 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.

Media Contacts:

David DeVoe
415-813-5066 ext. 1
david.devoe@devoe-co.com

Stacy Orff
415-813-5066 ext. 8
stacy.orff@devoe-co.com