



For Immediate Release

DeVoe & Company Supports BDO USA as They Add Lowery Asset Consulting

San Francisco, October 20, 2021 – DeVoe & Company, a leading consulting firm and investment bank serving the RIA industry, is pleased to have supported BDO USA, LLP in its addition of Lowery Asset Consulting, LLC, a Chicago-based consulting firm that advises on retirement plans, nonprofits and private wealth. Lowery will become part of BDO Wealth Advisors, a growing wealth management business within the accounting firm.

Founded in 2002, Lowery Asset Consulting, LLC (multi-billion-dollar AUA) is an investment consulting firm that offers financial planning, asset allocation, investment research, portfolio performance monitoring, and risk management.

“Lowery’s comprehensive, research-driven approach will complement BDO’s Wealth Advisory practice as we continue to expand our firm’s holistic approach to investment services,” said Stephen Ferrara, COO of BDO USA. “We are proud to welcome the Lowery team as we continue to build our wealth management presence in Chicago.”

“BDO USA’s proven track record of asset management experience provides a perfect home for our interdisciplinary approach to investment consulting. BDO’s like-minded focus on their people is also welcoming to our team,” said William Lowery, CEO of Lowery Asset Consulting, LLC.

“BDO is a leading accounting firm with a proven track record in the wealth management space,” said David DeVoe, Founder and CEO, DeVoe & Company. “Clients of both firms will benefit from the comprehensive and integrated approach to investment, wealth, and tax management.”

This is DeVoe & Company’s twelfth transaction in 2021.

About DeVoe & Company

DeVoe & Company is an investment bank and goal-based 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