



**For Immediate Release**

## **DeVoe & Company Advised D.R. Saur Financial in its Merger with Beacon Pointe Advisors**

San Francisco, April 20, 2021– DeVoe & Company, a leading consulting firm and investment bank serving the RIA industry, is honored to have advised D.R. Saur Financial, a \$230MM wealth advisor based in Dallas, TX, in its decision to merge with Beacon Pointe Advisors (\$15B).

Dan and Lisa Saur, principals for D.R. Saur Financial, have been preparing their firm for this transition for years now. “We have an amazing team who takes great pride in caring for our clients. An external transition became the right path to set the team and company up for optimal future success,” said Lisa, a principal of the firm.

“Beacon Pointe’s culture and broad resources gave us the confidence that our employees and clients would be well cared for,” said Dan, President and Financial Advisor. “Our advisors will be integrated into the Beacon Pointe family and will continue to manage and grow the business.” Dan will also remain as a senior wealth advisor.

“We are honored to work with Lisa, Dan and the D.R. Saur team,” said Matt Cooper, President, Beacon Pointe. “We saw a lot of similarities with the client relationship care and company culture.” Beacon Pointe also saw the transaction as an opportunity to add resources in Texas where the firm has a base in Plano. The transaction is the sixth by Beacon Pointe in the last six months.

Under the new relationship, D.R. Saur’s advisors will increasingly focus on building existing and new client relationships, while accessing sophisticated technology, financial planning and portfolio management tools of the new partner. “D.R. Saur’s team will benefit from Beacon Pointe’s comprehensive platform, providing their clients with a broader set of capabilities and enabling the team to be more efficient and effective,” said David DeVoe, Founder and CEO, DeVoe & Company.

### **About DeVoe & Company**

DeVoe & Company is a goal-based consulting firm and investment bank focused exclusively on guiding wealth management and investment management companies to a higher level of success. The firm provides consulting, M&A 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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