



For immediate release

DeVoe & Company Advises Financial Planning Solutions in its Sale to Beacon Pointe Advisors

San Francisco, CA – February 3, 2026 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported **Financial Planning Solutions, LLC** (“**Financial Planning Solutions**”), a Newton, MA-based RIA managing \$350 million in client assets, in its sale to **Beacon Pointe Advisors** (“Beacon Pointe”), a leading wealth management firm.

Financial Planning Solutions is a fiduciary firm that helps clients navigate complex financial decisions during major life transitions. The firm’s deep expertise in pensions, divorce, and retirement planning, blended with flexible engagement models and an education-driven approach, makes its services particularly valuable. Community involvement is central to Financial Planning Solutions’ culture, including volunteer work with the Dana-Farber Cancer Institute Pro Bono Financial Coaching Program, where team members support individuals navigating the financial challenges of cancer treatment.

“Partnering with Beacon Pointe Advisors relieved us of many of the day-to-day back-office responsibilities and, more importantly, allowed us to leverage their expertise and technology. This has given us more time to focus on our clients—why we first got into this business decades ago. Their national presence and high-caliber team also provide confidence that our team here in Newton will be well supported for years to come. After nearly two years of searching for a like-minded, client-focused firm, we are pleased to say Beacon Pointe checked every box,” said Financial Planning Solutions Partner and Managing Director, Rick Fingerman, CFP®, CDFIA®.

Founded in 2002, Beacon Pointe is one of the nation’s largest Registered Investment Advisory (RIA) firms, serving institutions, defined contribution plans, and high-net-worth individuals and families. With offices and clients across the country, the firm oversees approximately \$62 billion in total assets under advisement.

“We are proud to welcome the Financial Planning Solutions team into the Beacon Pointe family,” said Beacon Pointe CEO and Founder, Shannon Eusey, and President, Matt Cooper. “Beacon Pointe offers a collaborative environment that enhances their capabilities while elevating both the client and team experience, and the addition of Financial Planning Solutions reinforces that mission while expanding our ability to serve individuals and families with thoughtful, comprehensive wealth management.”

“Financial Planning Solutions has built a deeply client-focused firm and is well positioned for its next chapter of growth,” said David DeVoe, Founder and CEO of **DeVoe & Company**. “This partnership with Beacon Pointe reflects a strong alignment of culture and values, while providing additional scale and resources to support long-term success. We’re proud to have advised on a partnership that benefits the firm, its team, and its clients.

This is DeVoe & Company's first transaction as of January 2026.

About DeVoe & Company

DeVoe & Company is a goal-based investment bank and consulting firm focused exclusively on the wealth management industry. Recognized as a leading advisor to the RIA community, DeVoe & Company has completed over 900 engagements since inception. The firm's consulting, M&A and valuation services empower RIAs to accelerate the achievement of their business objectives. For more information, visit www.devoeandcompany.com.

Media Contacts:

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

Jennifer Sransky
415-813-5066 ext. 8
jennifer.sransky@devoe-co.com