

**FOR IMMEDIATE RELEASE**

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**INDUSTRY-LEADING RIA AND M&A STRATEGIST, DAVID DEVOE,  
LAUNCHES ADVISOR CONSULTING FIRM**

*DeVoe & Company to Provide Strategy and M&A Advisory Services to the Wealth Management  
and Investment Management Industries*

**SAN FRANCISCO, CALIF.** – Nov. 21, 2011 – David DeVoe, the former managing director of strategic business development at Charles Schwab Advisor Services, today launched a new firm, DeVoe & Company, dedicated to providing business strategy and M&A consulting services to the wealth management and investment management communities.

Leveraging Mr. DeVoe's extensive background of delivering strategic counsel to more than 300 registered investment advisors, DeVoe & Company's mission is to provide cost-effective and comprehensive transition planning services to wealth management firms, enabling them to best achieve their merger, acquisition and succession planning goals. DeVoe & Company's specialized services will include business strategy, M&A consultation, succession planning and valuation.

"Due to structural changes to the industry, the wealth management marketplace is evolving at an unprecedented rate," said Mr. DeVoe, Founder and Managing Partner of DeVoe & Company. "The continued record-breaking acceleration of mergers, acquisitions and succession activity creates both challenges and opportunities for advisors. We designed DeVoe & Company to provide the comprehensive strategy and advisory services financial firms need to address these issues and capitalize on this unique environment."

DeVoe & Company provides wealth management and investment management firms with strategy and M&A advisory services, customized to each individual RIA's business objectives. With extensive experience creating transformational change for wealth management and investment advisors, DeVoe & Company is uniquely positioned to develop and implement customized and scalable solutions to help advisors make and manage business-critical decisions.

"We are filling a crucial and growing need in the advisor community for tailored and actionable solutions to many common challenges," said Mr. DeVoe. "By giving advisors the tools and strategic counsel necessary to thrive in today's environment, our role is that of a valued strategic partner, helping them optimize and realize the true value of their business."

For more information about DeVoe & Company, please contact Lynn Delany at 415 813 5066 or [info@devoe-co.com](mailto:info@devoe-co.com).

**About DeVoe & Company**

DeVoe & Company is a financial services consulting firm committed to creating transformational change for wealth management and investment management advisors. Founded and led by David DeVoe, a financial industry veteran specializing in strategic RIA business development and succession planning, DeVoe & Company provides comprehensive strategy and advisory

services to help clients achieve maximum business growth and valuation. DeVoe & Company's suite of services includes comprehensive transition planning, including mergers and acquisitions, succession and new partner planning.

For more information, visit [www.devoeandcompany.com](http://www.devoeandcompany.com).

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