



**For immediate release**

## **DeVoe & Company Advises OFM Wealth as it Joins Modern Wealth Management**

San Francisco, CA – April 29, 2025 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported **OFM Wealth**, a Chicago-based, registered investment advisory firm (RIA) as it joins **Modern Wealth Management** (“Modern Wealth”). This marks Modern Wealth’s 16th strategic partnership in two years, bringing the firm’s total assets under management to more than \$7.5 billion.

Founded in 1981 by Sam Ogrizovich, CFP®, **OFM Wealth** is a fee-only, independent wealth management firm offering comprehensive services, including financial planning, investment management, tax, estate and retirement planning. OFM Wealth serves more than 175 households across Chicago and beyond, working with clients spanning various stages of life, including multigenerational families, business owners, pre-retirees, retirees and more.

“Modern Wealth stood out in its alignment with the way we approach comprehensive wealth management. While many firms focus on limited aspects of a client’s financial life, Modern Wealth is committed to looking at the whole picture,” said Ogrizovich, who joins Modern Wealth as Managing Director. “

Co-Founded by former United Capital executives and backed by Crestview Partners, **Modern Wealth** is an RIA firm providing a full suite of wealth management services carried out by a team of experts specializing in financial planning, tax planning, estate planning and more. “Establishing a presence in Chicago gives us a foothold in all major regions of the country. Bringing OFM Wealth into the Modern Wealth family accelerates our growth and further cements our nationwide presence” said, Jason Gordo, Co-founder and President of Modern Wealth.

“It was a privilege to support OFM Wealth in finding the right partner for their next chapter,” said David DeVoe, Founder and CEO of **DeVoe & Company**. “Their combination with Modern Wealth reflects the strength of OFM’s client-centric model and the depth of the firm they’ve built. This partnership positions them to expand their capabilities, enhance client outcomes, and accelerate growth in a way that honors their legacy and amplifies their future.”

This is DeVoe & Company’s second transaction of 2025.

### **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](http://www.devoeandcompany.com).

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