



For immediate release

DeVoe & Company Names Industry Veteran Gordon Ross as President

Strategic Hire Marks Continued Growth and Strengthens Leadership in RIA Consulting and M&A Advisory

San Francisco, CA, July 1, 2025 -- DeVoe & Company, the industry's leading consulting and M&A advisory firm for RIAs, appointed Gordon Ross as President. This strategic leadership addition underscores the firm's strong growth momentum and deep commitment to helping RIAs achieve success.

As President, Ross will oversee DeVoe & Company's day-to-day operations, with a focus on scaling the firm's consulting and M&A advisory business to meet growing client demand. Reporting to Founder & CEO David DeVoe, he will be responsible for implementing the firm's strategic goals and supporting the firm's continued growth in a thriving RIA market.

Ross brings over two decades of industry experience and a strong track record of helping RIAs achieve their goals. Most recently, he served as Chief Client Officer at Dynasty Financial Partners, where he led all client-facing functions, including relationship management, transitions, practice management, and service delivery—supporting RIAs across the country. His prior roles include senior positions at BBR Partners, Atlantic Trust, and Bestinvest.

"We're thrilled to welcome Gordon to DeVoe & Company," said David DeVoe, Founder & CEO. "His deep expertise in the RIA space, combined with his client-first mindset and operational leadership, makes him an ideal fit as we scale to meet the increasing number of firms that seek our services. The wealth management space is dynamic, maturing and being shaped by a new set of industry forces. Gordon's shared commitment to excellence and client service will help enable DeVoe & Company to serve more RIAs, as they engage with an evolving set of challenges and opportunities."

"I'm excited to join DeVoe & Company as it enters this next stage of momentum and impact," said Gordon Ross. "The company is uniquely positioned in the RIA space, as the leading firm that offers both business consulting and M&A advisory services under one roof. I'm honored to work with an organization that is so focused on helping individual RIAs and the overall wealth management community. I look forward to working with David and the exceptional team."

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 950 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.

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