



For immediate release

DeVoe & Company Advises Boston Harbor Wealth Advisors on its Sale to World Investment Advisors

San Francisco, CA – July 17, 2024 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported Boston Harbor Wealth Advisors, LLC (“BHWA”) an independent financial services firm with over \$3.5 billion in assets under management (AUM) in its sale World Investment Advisors, a leading financial advisory firm with \$11.5 billion in total wealth AUM.

Boston Harbor Wealth Advisors, located in Westborough, Massachusetts, specializes in comprehensive financial planning and goal-oriented investment management for individuals, families, and businesses. The firm has 76 team members and 15 offices across the Northeast and Ohio.

“Our partnership with World enables us to enhance and expand our existing acquisition strategy and provides a tremendous opportunity for our advisors and clients,” said Matthew Davis, CEO of BHWA. “Having World’s backing will significantly increase our effectiveness as we expand our recruiting efforts in the RIA space with a more robust and competitive offering for advisors.”

“We are delighted to welcome the Boston Harbor team to the World family. In addition to an incredible group of financial advisors, we are fortunate to be adding premier leadership and team members that will prove invaluable for our advisors, clients, and ongoing acquisition growth strategy,” said Troy Hammond, CEO of World Investment Advisors. “This partnership further solidifies World as the destination of choice for growth-focused advisory firms.”

“This partnership marks a significant milestone, bringing together complementary strengths that promise mutual growth and innovation,” said David DeVoe, Founder and CEO of DeVoe & Company. “The strategic collaboration promises to unlock new opportunities benefitting clients and team members.”

This is DeVoe & Company’s fifth transaction of 2024.

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.

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