



For immediate release

DeVoe & Company Advises FRG Family Wealth Advisors in its Merger with Mission Wealth

San Francisco, CA – June 9, 2026 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported **FRG Family Wealth Advisors** (“**FRG**”), a Bellevue, WA-based RIA managing \$866 million in client assets, in its merger with **Mission Wealth**, a leading wealth management firm.

Founded in 2009, FRG Family Wealth Advisors serves high-net-worth individuals, families, and businesses both locally and nationally by providing tailored portfolio management, asset allocation, and financial planning services.

Mission Wealth is a nationally recognized RIA known for its comprehensive service model, driven by a technology stack that offers financial planning, investment counsel, tax strategies, estate planning coordination, philanthropic advice, and asset protection solutions tailored to each client’s needs. The firm oversees over \$16.7 billion in client assets under management.

“We are thrilled to welcome FRG Family Wealth Advisors to Mission Wealth and strengthen our presence in the Pacific Northwest,” said Matthew Adams, CEO and Managing Partner of Mission Wealth. “This partnership reflects our shared values, culture, and client-first philosophy, now supported by expanded capabilities and resources.”

“It was a privilege to support FRG Family Wealth Advisors in finding the right partner for their next chapter,” said David DeVoe, Founder and CEO of **DeVoe & Company**. “This strategic partnership brings together two firms committed to delivering a personalized client experience while fostering a shared vision for long-term growth. We look forward to seeing the FRG team continue to build on its success as part of Mission Wealth.”

This is DeVoe & Company’s second 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.

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