



For immediate release

DeVoe & Company Advises Compass Wealth Management in its Merger with Cerity Partners

Miami, FL – October 1, 2026 – DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported **Compass Wealth Management** ("Compass"), an Atlanta-based RIA managing \$340 million in assets under management in its merger with **Cerity Partners**, a nationally recognized RIA with over \$206 billion in assets under management.

Founded in 2011 by Robert Amato, Compass is an independent, fee-only wealth management and investment advisory firm serving corporate executives, business owners, and retirees throughout the Atlanta area. Compass provides holistic wealth management services spanning investment management, financial and retirement planning, tax planning, estate and legacy planning, risk management, and charitable giving strategies.

"Compass has always combined the personal attention of a boutique firm with the resources and capabilities our clients expect from a larger organization," said Robert Amato, Founder and Principal of Compass Wealth Management. "Cerity Partners allows us to preserve the personalized planning, highly customized investment management, and close client relationships that define our firm, while strengthening the operations behind the scenes and adding broader tax and estate planning expertise. It also creates meaningful growth opportunities for our team. That combination made Cerity Partners the right long-term fit for Compass."

"Compass Wealth Management's client-first approach and deep roots in the Atlanta community make them an ideal fit for Cerity Partners," said Claire O'Keefe, Partner and Head of Partner Development at Cerity Partners. "We're thrilled to welcome our new colleagues, who have built a terrific firm defined by trust and long-term relationships, to our partnership and are excited for our future together."

"It was an honor to advise Compass Wealth Management in its partnership with Cerity Partners," said David DeVoe, Founder and CEO of **DeVoe & Company**. "Robert and his team have built an impressive firm, and this combination pairs their comprehensive, planning-led approach with Cerity Partners' national platform and breadth of capabilities, creating a strong foundation for the future. We look forward to seeing both teams continue to thrive and serve their clients for years to come."

This is DeVoe & Company's fourth transaction of 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 1000 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.

Media Contacts:

David DeVoe

415-813-5066 ext. 1

David.devoe@devoe-co.com

Natalie Wheeler

415-813-5066 ext. 20

Natalie.wheeler@devoe-co.com