DEVOE & COMPANY

For immediate release

DeVoe & Company Advises Garner Asset Management Corporation in its Sale to Aprio Wealth Management

Miami, FL – November 3, 2026 − DeVoe & Company, a leading M&A consulting firm serving the wealth management industry, is honored to have supported **Garner Asset Management Corporation** ("Garner"), a Plano, TX-based RIA managing $414 million in assets under management, in its sale to **Aprio Wealth Management ("AWM")**, the wealth management arm of Aprio, the 20th largest business advisory and accounting firm in the U.S., with approximately $6.1 billion in assets under advisement as of September 30, 2026.

Founded in 1998 by Robert S. Garner, Garner Asset Management advises high-net-worth individuals, retirees and those approaching retirement, holders of concentrated stock positions, and multigenerational families. Founder and President Robert Garner joins Aprio as a partner.

"As I thought about the future of our firm, finding the right home for our clients and our people was incredibly important to me," said Robert Garner, Founder and President of Garner Asset Management. "Aprio shares our commitment to clients and will bring capabilities and resources that will allow us to do even more for them as their needs evolve."

AWM pairs its wealth management services with Aprio's accounting, advisory, tax and legal capabilities, giving clients a coordinated approach as their personal and business financial decisions increasingly intersect. Garner represents Aprio's first standalone wealth management acquisition and establishes its presence in the Dallas-Fort Worth market.

"Every client's financial life evolves, and the advice and resources available to them should evolve with it," said Keith Greenwald, CEO of Aprio Wealth Management. "Like Aprio, Robert and his team believe clients are best served when financial planning and accounting work together. As we grow in Texas, our focus remains on understanding what matters most to our clients and creating greater value for them."

"Robert has built a firm defined by deep client relationships and thoughtful, personalized advice," said David DeVoe, Founder and CEO of **DeVoe & Company**. "Aprio is an ideal partner to carry that legacy forward, pairing Garner's high-touch service with the depth and breadth of Aprio's platform. We were proud to support Robert in this milestone transaction and look forward to seeing the team thrive in its next chapter."

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 1,000 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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