Secret Intelligence

A Monthly Briefing on $500M+ Advisor Moves

OCTOBER 2026 |

SPARTAN ADVISORY

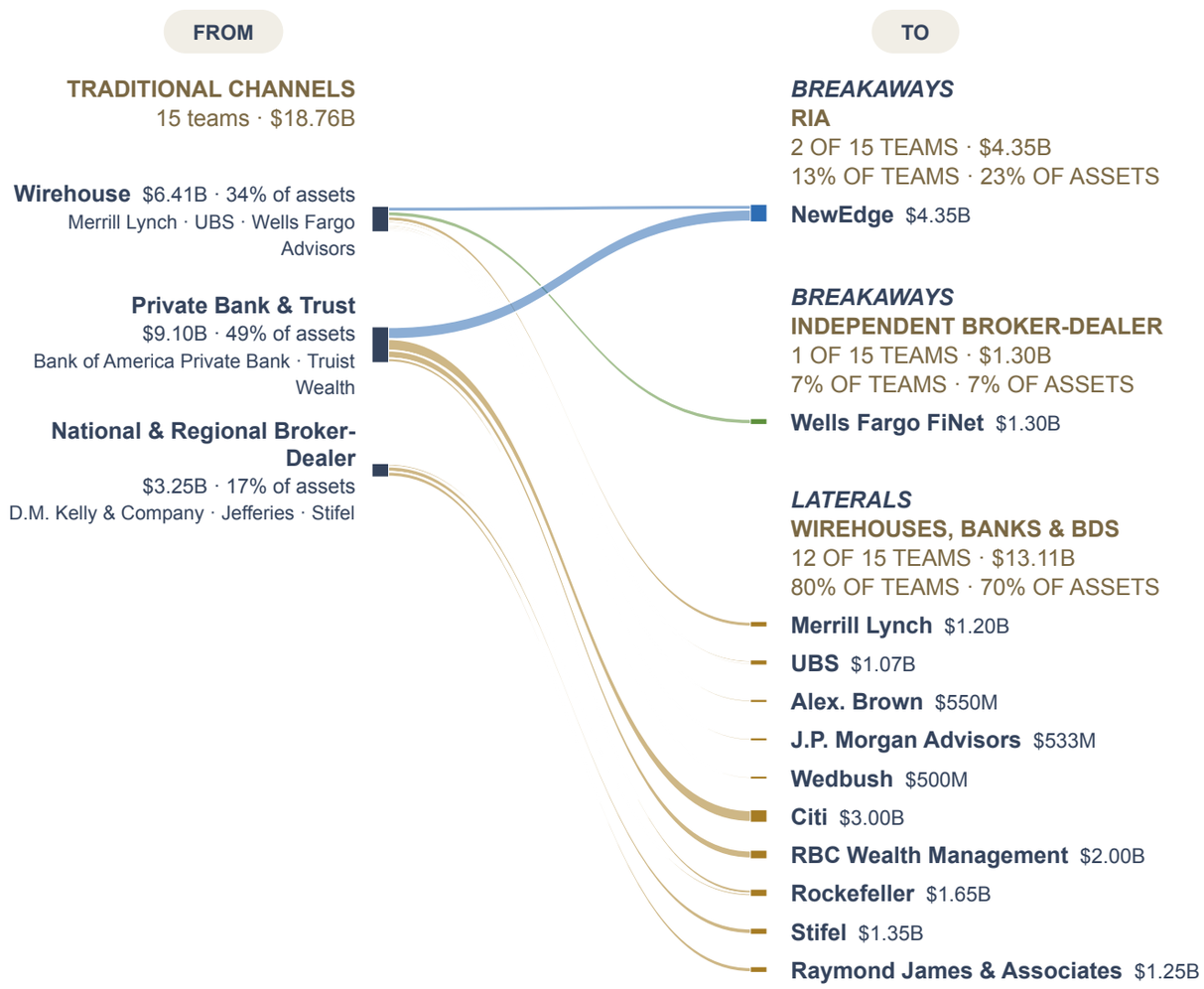
SEPTEMBER AT A GLANCE

33 verified transactions of $500M or more in September, $64.04 billion in reported assets. Out of wirehouses, banks and broker-dealers: fifteen teams and $18.76 billion. 80% of teams and 70% of assets moved to another wirehouse, bank or broker-dealer. 20% of teams and 30% of assets went independent, 13% of teams to an RIA and 7% of teams to an independent broker-dealer. Out of independent firms: eighteen transactions and $45.28 billion. 61% of transactions and 71% of assets were acquisitions. 39% of transactions and 29% of assets were teams that moved to another independent firm.

BREAKAWAYS & LATERALS

15 teams · $18.76B reported assets

Fifteen teams left wirehouses, banks and broker-dealers in September, $18.76 billion in reported assets between them. 80% of teams and 70% of assets moved to another wirehouse, bank or broker-dealer: Citi and RBC Wealth Management together took $5 billion from Bank of America Private Bank. The other 20% of teams and 30% of assets went independent: NewEdge picked up $4.35 billion across two teams and Wells Fargo FiNet took $1.3 billion from UBS. UBS was the departure point for two of the three teams. The banks and trusts were the biggest source at 49% of the assets leaving wirehouses, banks and broker-dealers, with three of those four teams out of Bank of America Private Bank.

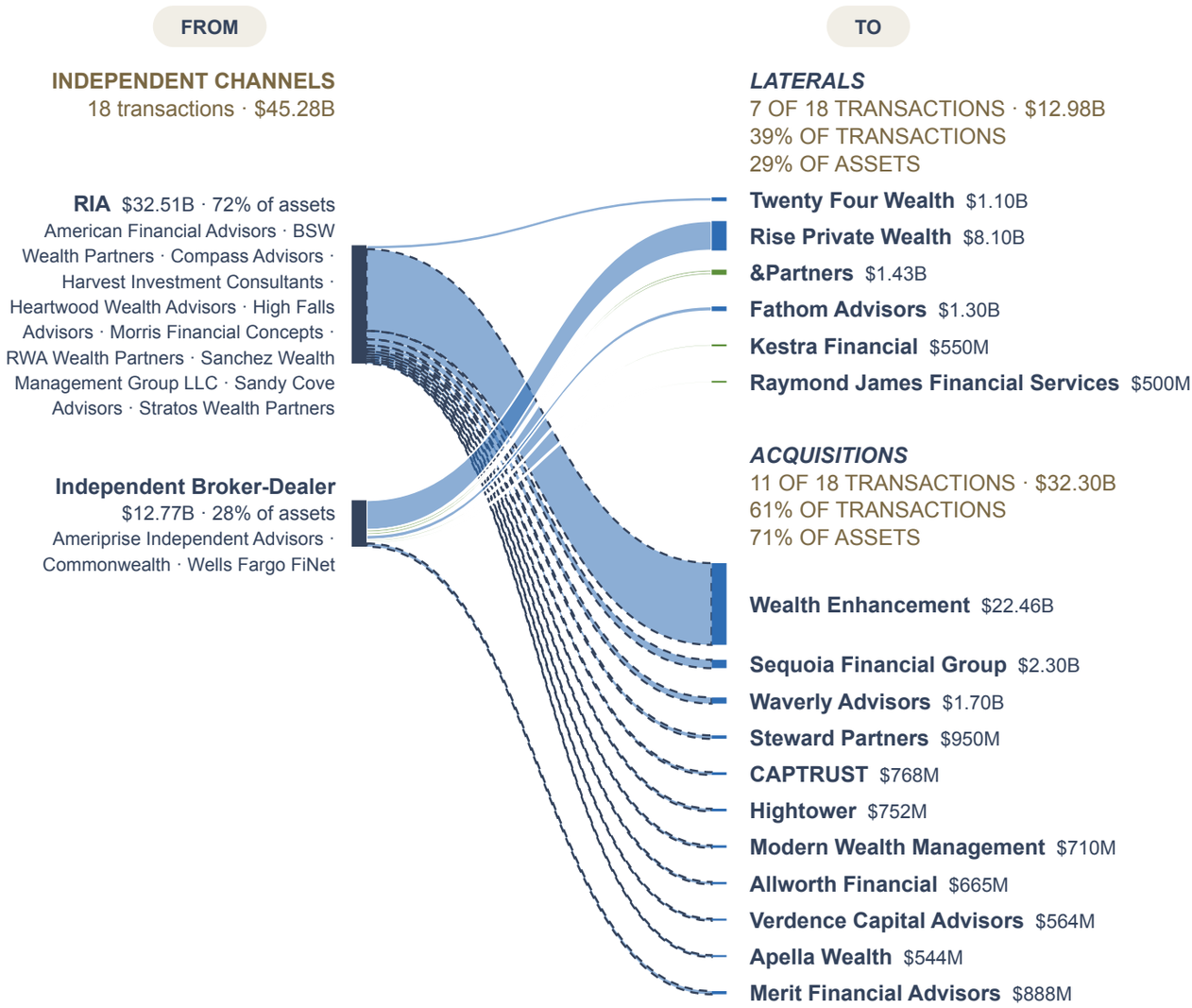


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LATERALS & ACQUISITIONS

18 transactions · $45.28B reported assets

September saw eighteen transactions out of independent firms, $45.28 billion in reported assets between them. 61% of transactions and 71% of assets were acquisitions, eleven deals and $32.3 billion in all, dominated by Wealth Enhancement's purchase of RWA Wealth Partners at $22.46 billion, 70% of acquisition assets on its own. The remaining ten deals averaged $984 million. The other 39% of transactions and 29% of assets were teams that moved to another independent firm: Rise Private Wealth took the biggest piece, $8.1 billion from Ameriprise Independent Advisors, and &Partners picked up $1.43 billion across two teams. Ameriprise Independent Advisors was the departure point for three of the seven teams. RIAs were the biggest source at 72% of the assets leaving independent firms.



2026-09-01 through 2026-09-30 · Verified transactions with at least $500M in reported practice assets. Band width is proportional to reported assets on one shared scale. Counts represent teams or practices. Percentages are shares of the chart's teams or transactions, or of its reported assets, as labelled. Acquisitions use dashed bands.

BREAKAWAYS

NewEdge opens Fort Lauderdale with $3.1 billion team

PRIVATE BANK & TRUST → INTEGRATED RIA · $3,100M REPORTED ASSETS
FORT LAUDERDALE, FL · **SEP 03, 2026**

Trace Shapiro, Paul Yates, Alexandra Escobedo and Michael Wohlgemuth joined NewEdge Wealth from Bank of America Private Bank on September 1, establishing its fourth Florida office. The Fort Lauderdale team had overseen approximately $3.1 billion in client assets and generated around $20 million in annual revenue, according to AdvisorHub. *Source: AdvisorHub* ↗

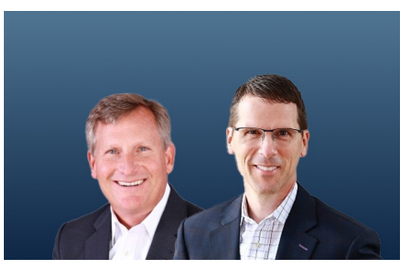


Michael Wohlgemuth, Alexandra Escobedo, Trace Shapiro and Paul Yates (L–R)
Photo: AdvisorHub

FiNet practice Ascend lands $1.3 billion UBS team

WIREHOUSE → INDEPENDENT BROKER-DEALER · $1,300M REPORTED ASSETS
DUBLIN, OH · **SEP 30, 2026**

Jeffrey Cullman and W. Bruce Holt moved the Cullman/Holt Group from UBS to Ascend Advisory Group, a Wells Fargo Advisors Financial Network practice in Dublin, Ohio, on September 29. The seven-person team had managed approximately $1.3 billion in client assets at UBS and joins with advisor Ben Krajnak and four client associates, according to AdvisorHub. Cullman spent 21 of his 31 years in the industry at UBS. *Source: Financial Advisor* ↗



Jeffrey Cullman (left) and Bruce Holt
Photo: AdvisorHub

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BREAKAWAYS (CONTINUED)

NewEdge opens Wayzata with $1.25 billion UBS team

WIREHOUSE → INTEGRATED RIA · $1,250M REPORTED ASSETS · WAYZATA, MN · **SEP 15, 2026**

James Shafer and Michael Block joined NewEdge Wealth from UBS on September 14 with a practice reported at $1.25 billion in assets. Joseph Gossett, Pamela Smith and Rachelle Carlson-Oien moved with them, alongside three support staff. The team established NewEdge Wealth's 22nd location in Wayzata, Minnesota. *Source: AdvisorHub*



James Shafer (left) and Michael Block
Photo: AdvisorHub

LATERALS

Citi hires $3 billion Bank of America private banker

PRIVATE BANK & TRUST → PRIVATE BANK & TRUST · $3,000M REPORTED ASSETS
JACKSONVILLE, FL · **SEP 11, 2026**

Teresa Radzinski joined Citi's private bank in Jacksonville on September 9 after overseeing around $3 billion at Bank of America Private Bank, according to AdvisorHub. Her clients include family offices with at least $500 million in assets. The hire followed a career at Bank of America and Merrill dating to 2000, including a role as co-head of financial institutions capital markets and financing. *Source: AdvisorHub*



Teresa Radzinski
Photo: AdvisorHub

RBC adds $2 billion private banking team in La Jolla

PRIVATE BANK & TRUST → NATIONAL & REGIONAL BROKER-DEALER · $2,000M REPORTED ASSETS
LA JOLLA, CA · **SEP 22, 2026**

Lisa Behun and Dirk Harris joined RBC Wealth Management from Bank of America Private Bank on September 11, bringing a La Jolla practice reported at $2 billion in assets. Kevin Wilson and Erin Marshall also joined in support roles. The four-person team reports to RBC's Southern California complex. *Source: InvestmentNews*



Lisa Behun
Photo: RBC Wealth Management

LATERALS (CONTINUED)

Stifel adds $1.35 billion Jefferies team in Chicago

NATIONAL & REGIONAL BROKER-DEALER → NATIONAL & REGIONAL BROKER-DEALER
$1,350M REPORTED ASSETS · CHICAGO, IL · **SEP 16, 2026**

Scott Hall and Robert Mulcahy joined Stifel from Jefferies on September 16 with a Chicago practice reported at $1.35 billion in assets. Support staff member Simon Hay moved with the Hall Wealth Advisory Group, which reports to branch manager Bill Scherr and central region head Kevin Ortmeyer. Hall had joined Jefferies in 2013; Mulcahy followed in 2015. *Source: Stifel* ↗



Hall Wealth Advisory Group
Photo: AdvisorHub

Greenwood Wealth Partners joins Raymond James with $1.25 billion

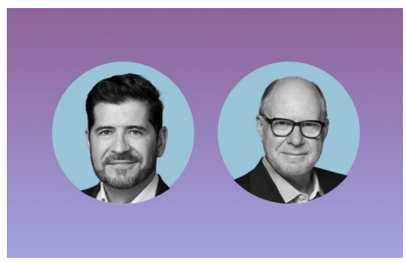
NATIONAL & REGIONAL BROKER-DEALER → NATIONAL & REGIONAL BROKER-DEALER
$1,250M REPORTED ASSETS · CLIVE, IA · **SEP 24, 2026**

David Lorbiecki, Dan “Chris” McPhail Jr., David Haas and Willis Gaer joined Raymond James & Associates in Clive, Iowa, operating as Greenwood Wealth Partners of Raymond James. The team arrives from D.M. Kelly & Company, where it managed approximately $1.25 billion in client assets, and is joined by practice business manager Holly Ellsworth. Lorbiecki began his career in 1993 and spent 30 years at his previous firm, according to the Raymond James announcement. *Source: Raymond James* ↗

Merrill adds $1.2 billion UBS team in Santa Fe

WIREHOUSE → WIREHOUSE · $1,200M REPORTED ASSETS · SANTA FE, NM · **SEP 10, 2026**

John Vazquez and Manuel Monasterio joined Merrill from UBS on September 9, bringing a Santa Fe practice reported at $1.2 billion in assets and $4.7 million in annual revenue. Four support staff moved with the team. Vazquez had been with UBS since 1999 and Monasterio since 2008. *Source: AdvisorHub* ↗



Manuel Monasterio (left) and John Vazquez
Photo: AdvisorHub

LATERALS (CONTINUED)

Rockefeller adds $1 billion Truist team in Charlotte

PRIVATE BANK & TRUST → NATIONAL & REGIONAL BROKER-DEALER · $1,000M REPORTED ASSETS
CHARLOTTE, NC · **SEP 30, 2026**

Paul Irving, Gavin Shuck and Brett Schmidt moved Piedmont Wealth Partners from Truist to Rockefeller Global Family Office in Charlotte on September 30, joined by support staff Nichole McKeon and Ben Beeson. The team managed $1 billion in client assets and produced $6.2 million in annual revenue at Truist, according to AdvisorHub. Irving and Shuck joined the bank's BB&T predecessor in 2013 and 2012, and Schmidt spent his 14-year career at BB&T and Truist. *Source: Barron's* ↗

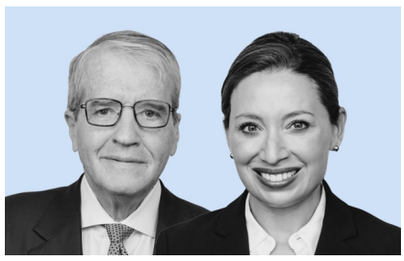


Nichole McKeon, Paul Irving, Gavin Shuck, Brett Schmidt and Ben Beeson (L–R)
Photo: Rockefeller Global Family Office

Rockefeller recruits $650 million Stifel team

NATIONAL & REGIONAL BROKER-DEALER → NATIONAL & REGIONAL BROKER-DEALER
$650M REPORTED ASSETS · CHICAGO, IL · **SEP 04, 2026**

Edward Phillipp and Michelle Colquhoun joined Rockefeller from Stifel on September 4 with a Chicago practice reported at $650 million in assets and $4 million in annual revenue. Laura Bienz and Patrick Phillipp moved in support roles. Both advisors had worked at Lehman Brothers and Barclays before the latter sold its wealth unit to Stifel in 2015. *Source: AdvisorHub* ↗



Edward Phillipp (left) and Michelle Colquhoun
Photo: AdvisorHub

LATERALS (CONTINUED)

UBS recruits Merrill duo in Silicon Valley

WIREHOUSE → WIREHOUSE · $575M REPORTED ASSETS · SILICON VALLEY, CA · **SEP 25, 2026**

John Pham and Jimmy Yip joined UBS on September 25 with three support staff, working from Palo Alto and San Jose. AdvisorHub reported $575 million in assets and $7.5 million in annual revenue for the departing practice. Two junior brokers and a client associate remained at Merrill. *Source: UBS* ↗



Jimmy Yip and John Pham (center), with UBS managers Emily de la Reguera and Jacqueline Kehoe
Photo: AdvisorHub

Alex. Brown adds $550 million Merrill advisor in Houston

WIREHOUSE → NATIONAL & REGIONAL BROKER-DEALER · $550M REPORTED ASSETS
HOUSTON, TX · **SEP 10, 2026**

Michael Rogala joined Alex. Brown, the private wealth division of Raymond James & Associates, in Houston from Merrill Lynch, where he managed approximately $550 million in client assets. His practice serves families and entrepreneurs preparing for the sale of a business. Rogala has 20 years of industry experience, the last 15 at his previous firm, according to the Raymond James announcement. *Source: Raymond James* ↗



Michael Rogala
Photo: Alex. Brown, a division of Raymond James

LATERALS (CONTINUED)

J.P. Morgan adds $533 million Wells Fargo Advisors practice

WIREHOUSE → NATIONAL & REGIONAL BROKER-DEALER · $533M REPORTED ASSETS
PALO ALTO, CA · **SEP 10, 2026**

Pourya Naeimi joined J.P. Morgan Advisors from Wells Fargo Advisors on September 4 in Palo Alto, with a practice reported at $533 million in client assets. Client associate Brian Hackmeister also moved. Naeimi began his career at Smith Barney in 2003 and joined Wells in 2010; he enters J.P. Morgan's traditional brokerage unit. *Source: AdvisorHub* ↗



Pourya Naeimi
Photo: AdvisorHub

UBS adds $500 million Merrill team in Bellevue

WIREHOUSE → WIREHOUSE · $500M REPORTED ASSETS · BELLEVUE, WA · **SEP 04, 2026**

John Hall and Aaron Marshall joined UBS from Merrill on September 4 with client associate Jennifer Teddy. The Bellevue practice's $500 million asset figure comes from a Forbes ranking cited by AdvisorHub and is a historical measure of practice size. Hall had joined Merrill in 2013 after working at Morgan Stanley; the team now sits within UBS's Pacific Northwest market. *Source: UBS / Business Wire* ↗



John Hall
Photo: UBS

LATERALS (CONTINUED)

Wedbush adds Redstone team from UBS

WIREHOUSE → NATIONAL & REGIONAL BROKER-DEALER · $500M REPORTED ASSETS
GREENSBORO, NC · **SEP 10, 2026**

James Carlson, Kevin Herron Jr. and Patty Blair joined Wedbush from UBS in Greensboro on September 4, alongside client service associate Sherry Malone. The September 10 announcement reported more than $500 million in assets under management as of August.

Source: Wedbush / GlobeNewswire ↗



Redstone Wealth Management Group
Photo: Wedbush / GlobeNewswire

LATERALS (CONTINUED)

Rise launches $8.1 billion RIA from Ameriprise

INDEPENDENT BROKER-DEALER → STANDALONE RIA · $8,100M REPORTED ASSETS
BEDFORD, NH · **SEP 17, 2026**

Brent A. Kiley and Robert A. Bonfiglio led a team of about 40 advisors out of Ameriprise's independent channel to launch Rise Private Wealth Management in Bedford, New Hampshire, on September 10. Barron's reported that the team oversaw $8.1 billion in client assets. Dynasty Financial Partners provides back-office support, an investment platform and client referrals, and Schwab is custodian; Dynasty did not take a stake in the firm. Some members of the former team stayed at Ameriprise. *Source: Barron's* ↗



Rise co-founders Brent Kiley (left) and Robert Bonfiglio
Photo: AdvisorHub

LATERALS (CONTINUED)

Fathom launches $1.3 billion independent RIA

INDEPENDENT BROKER-DEALER → STANDALONE RIA · $1,300M REPORTED ASSETS
BLOOMINGTON, MN · **SEP 16, 2026**

Randy Doroff, Todd Doroff and Mark Anderson led a 23-person team out of Ameriprise to launch Fathom Advisors in Bloomington, with Schwab selected as custodian. The firm registered on September 17. The $1.3 billion asset figure comes from a Forbes ranking cited by WealthManagement.com and is a historical measure of the practice, which includes nine named advisors. *Source: Wealth Management* ↗



The Fathom Advisors team
Photo: WealthManagement.com

LATERALS (CONTINUED)

Twenty Four Wealth launches $1.1 billion independent RIA

AFFILIATED RIA PRACTICE → STANDALONE RIA · $1,100M REPORTED ASSETS
DARIEN, CT · **SEP 01, 2026**

Tony Truino, Mike Carbino, John Dougherty, Chris Zapata and Ryan Hunter left Stratos Wealth Partners to launch Twenty Four Wealth as an independent RIA in Darien, Connecticut. The firm serves high-net-worth families, executives, business owners and professional athletes and reported $1.1 billion in client assets, according to Financial Advisor magazine. Twenty Four Wealth custodies with Goldman Sachs, Fidelity and Schwab and uses Private Client Services as its broker-dealer. *Source: Twenty Four Wealth / PR Newswire* ↗



Chris Zapata, Dawn DeMaio, Brendan Rafalski, Tony Truino, John Dougherty, Mike Carbino and Ryan Hunter (L–R)
Photo: Twenty Four Wealth via PR Newswire

LATERALS (CONTINUED)

Rowland Sullivan joins &Partners with $744 million

INDEPENDENT BROKER-DEALER → INDEPENDENT BROKER-DEALER · $744M REPORTED ASSETS
LAKE OZARK, MO · **SEP 24, 2026**

Patrick Rowland, Jacob Sullivan, Jesse Dale and Lauren Kane joined &Partners on September 22 with four support staff and a Lake Ozark practice reported at $744 million in assets. They had moved from Wells Fargo Advisors to Wells Fargo FiNet just over two years earlier. The group, formerly Stonebridge Wealth Management, now operates as Rowland Sullivan Wealth Management. *Source: AdvisorHub* ↗



Rowland Sullivan Wealth Management
Photo: AdvisorHub

&Partners enters Alaska with $684 million Commonwealth team

INDEPENDENT BROKER-DEALER → INDEPENDENT BROKER-DEALER · $684M REPORTED ASSETS
FAIRBANKS, AK · **SEP 01, 2026**

SBS Retirement Consultants, led by Shawn Wiegand, Jordan Hendry, Benjamin Roth and Shannon Staiger, left Commonwealth Financial Network for &Partners in Fairbanks on September 1 with four support staff. The team, affiliated with Commonwealth since 2004, managed $684 million in client assets and is the first to join &Partners in Alaska, according to AdvisorHub. *Source: AdvisorHub* ↗



Shawn Wiegand
Photo: SBS Retirement Consultants

LATERALS (CONTINUED)

Kestra welcomes $550 million Ecclesiastes Wealth Partners

INDEPENDENT BROKER-DEALER → INDEPENDENT BROKER-DEALER · $550M REPORTED ASSETS
RICHARDSON, TX · **SEP 29, 2026**

Ecclesiastes Wealth Partners, founded by Shannon Harris with partners Sarah Walsh and Justin Snowden, joined Kestra Financial's advisor community from Ameriprise on September 29. The Richardson, Texas firm oversees approximately $550 million in client assets and focuses on comprehensive and multigenerational planning, according to Kestra's announcement. *Source: Kestra Financial* ↗



Shannon Harris
Photo: Ecclesiastes Wealth Partners

Harris Wealth Partners moves $500 million practice to Raymond James

INDEPENDENT BROKER-DEALER → INDEPENDENT BROKER-DEALER · $500M REPORTED ASSETS
ROCHESTER, NY · **SEP 22, 2026**

Todd Harris, Connie Gilderhus, Sarah Fuller, Robert Conderman and Joseph Palma joined Raymond James Financial Services in Rochester, New York, operating as Harris Wealth Partners. The team arrives from Commonwealth Financial Network, where it managed approximately $500 million in client assets, with three support staff. Harris, the team's principal, has more than 20 years of industry experience, according to the Raymond James announcement. *Source: Raymond James* ↗



Todd Harris
Photo: Harris Wealth Partners / Raymond James Financial Services

ACQUISITIONS

Wealth Enhancement to acquire $22.5 billion RWA Wealth Partners

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $22,460M REPORTED ASSETS
BOSTON, MA · **SEP 30, 2026**

Wealth Enhancement agreed to acquire RWA Wealth Partners, a Boston firm with approximately $22.46 billion in client assets as of June 30, in its largest acquisition to date. RWA, led by CEO and chief economist Michelle Knight, combines a family office business and a private wealth business with offices from Newton to San Francisco. The deal, announced September 30, is expected to close in the fourth quarter, according to Financial Advisor magazine. *Source: Financial Advisor* ↗



Michelle Knight
Photo: RWA Wealth Partners

Sequoia Financial acquires $2.3 billion BSW Wealth Partners

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $2,300M REPORTED ASSETS
BOULDER AND DENVER, CO · **SEP 01, 2026**

Sequoia Financial Group acquired BSW Wealth Partners, a Boulder and Denver RIA with approximately $2.3 billion in client assets, in a deal announced September 1. BSW, led by CEO David Wolf with 11 additional advisors, traces its roots to a practice founded in 1992 and will operate under the Sequoia Financial brand, according to AdvisorHub. *Source: Sequoia Financial Group / PR Newswire* ↗



David Wolf
Photo: Sequoia Financial Group

Waverly acquires $1.7 billion Heartwood

HYBRID RIA → INTEGRATED RIA · ACQUISITION · $1,700M REPORTED ASSETS
RICHMOND, VA · **SEP 29, 2026**

Waverly Advisors closed its acquisition of Heartwood Wealth Advisors on September 25, adding a Richmond practice with approximately $1.7 billion in assets. Stephen Clarke, Edwin "Sid" Martin III, Wesley Kaufman and Benjamin Gurley lead the firm, which also has nine support staff. Heartwood became an RIA in 2019 after operating through Wells Fargo FiNet. *Source: Waverly Advisors* ↗



Edwin "Sid" Martin III
Photo: Waverly Advisors

ACQUISITIONS (CONTINUED)

Steward Partners adds $950 million American Financial Advisors

STANDALONE RIA → MULTIPLE AFFILIATION MODELS · ACQUISITION · $950M REPORTED ASSETS
MARIETTA, GA · **SEP 17, 2026**

American Financial Advisors, the Marietta, Georgia RIA founded in 1991 by former Delta pilot Michael Stark, joined Steward Partners' M&A hybrid platform in a deal reported September 17. The firm manages $950 million in client assets across more than 800 relationships, according to its Form ADV, with a client base that grew from Delta employees. Stark registered with Steward Partners Investment Advisory on September 25, according to WealthManagement.com and regulatory records. *Source: Steward Partners / PR Newswire* ↗



Michael Stark
Photo: WealthManagement.com

Merit acquires $888 million Commonwealth practice

INDEPENDENT BROKER-DEALER → INTEGRATED RIA · ACQUISITION · $888M REPORTED ASSETS
DEERFIELD, IL · **SEP 18, 2026**

Timothy Brennan's Deerfield practice joined Merit Financial Advisors in a deal that closed September 10, adding $888 million in reported assets. Brennan had spent 25 years at Commonwealth and retains brokerage registration through Purshe Kaplan Sterling. *Source: Merit Financial Advisors / PR Newswire* ↗



Timothy Brennan
Photo: AdvisorHub

ACQUISITIONS (CONTINUED)

CAPTRUST acquires $767.5 million Compass Advisors

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $768M REPORTED ASSETS
MELVILLE, NY · **SEP 23, 2026**

CAPTRUST added Compass Advisors, the Melville, New York RIA founded in 2013 by Michael Cuneo and Lauren King, in a deal announced September 23. Compass reports $767.5 million in assets in regulatory filings and serves institutional and wealth management clients. The firm adopts the CAPTRUST brand. *Source: CAPTRUST / PR Newswire*



Michael Cuneo (left) and Lauren King
Photo: WealthManagement.com

Hightower Signature Wealth adds $752 million Sandy Cove

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $752M REPORTED ASSETS
HINGHAM, MA · **SEP 30, 2026**

Hightower agreed to acquire Sandy Cove Advisors, a Hingham, Massachusetts firm with about $752 million in assets under management, for its Hightower Signature Wealth employee channel. Founded by president and chief wealth strategist Deirdre Prescott and led with chief investment officer Kate Saltonstall, Sandy Cove focuses on family legacy planning and clients in major life transitions. The deal was expected to close September 30, according to Financial Advisor magazine. *Source: Financial Advisor*



Deirdre Prescott
Photo: Hightower Signature Wealth

ACQUISITIONS (CONTINUED)

Modern Wealth acquires $710 million Jacksonville RIA

HYBRID RIA → INTEGRATED RIA · ACQUISITION · $710M REPORTED ASSETS
JACKSONVILLE, FL · **SEP 10, 2026**

Modern Wealth Management acquired Sanchez Wealth Management Group, a Jacksonville, Florida firm with $710 million in client assets, in a deal announced September 10. The practice is led by Christen Sanchez, his sister Dawn Nicoles and Josh Mandelkorn, with three support staff, and joined Modern Wealth at the end of August. Sanchez launched the RIA in 2013, according to AdvisorHub. *Source: AdvisorHub* ↗



Lindsey Hall, Josh Mandelkorn, Chris Sanchez, Dawn Sanchez Nicoles and Alexandria Sanchez (L–R)
Photo: AdvisorHub

Allworth adds $665 million Rochester practice

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $665M REPORTED ASSETS
ROCHESTER, NY · **SEP 01, 2026**

Allworth Financial announced its acquisition of High Falls Advisors on September 1, adding a Rochester practice with $665 million under management and 21 professionals. Led by Kenneth Burke and Jennifer Vogler, the firm combines wealth management with an in-house tax practice. The team includes eight financial advisors and four tax professionals. The exact closing date was not disclosed. *Source: Allworth Financial / PR Newswire* ↗



Kenneth Burke
Photo: High Falls Advisors

ACQUISITIONS (CONTINUED)

Verdence acquires $564 million Harvest

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $564M REPORTED ASSETS
HUNT VALLEY, MD · **SEP 22, 2026**

Verdence Capital Advisors closed its acquisition of Harvest Investment Consultants on September 18, adding a Hunt Valley practice with $564 million under management. Michael Meily, Mark Pallack, David Baker and Donna Zidwick joined alongside five other team members. Harvest was founded in 1987; the deal is Verdence's second acquisition since receiving investment from Wealth Partners Capital Group and HGGC in April. *Source: Verdence Capital Advisors / Business Wire* ↗



Michael Meily
Photo: AdvisorHub

Apella acquires $544 million Morris practice

STANDALONE RIA → INTEGRATED RIA · ACQUISITION · $544M REPORTED ASSETS
MOUNT PLEASANT, SC · **SEP 15, 2026**

Apella Wealth closed its acquisition of Morris Financial Concepts on September 11, adding approximately $544 million in assets under management and an office in Mount Pleasant, South Carolina. Founder Kyra Hollowell Morris and chief compliance officer James "Tucker" Morris joined with the full team. Founded in 1983, Morris became Apella's 28th acquisition and its 17th alongside Wealth Partners Capital Group. *Source: Apella Wealth / Business Wire* ↗



Kyra Hollowell Morris
Photo: Apella Wealth

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