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M&A

Beacon Pointe Makes Deal Hat Trick, Adding $1.35 Billion

Beacon Pointe Advisors disclosed three acquisitions totaling roughly $1.35 billion: WorthPointe Financial Planners (about $1 billion, California and Texas), Dallas-based Silver Lake Capital Partners (about $200 million) and R Meier Wealth Management (about $150 million) in Wisconsin. The additions push the consolidator past $70 billion in AUM across more than 90 offices, extending its steady cadence of planning-led tuck-ins.

M&A

Captrust Acquires $1.1B Pacific Northwest RIA

Captrust has acquired Pacific Sage Partners, an Edmonds, Washington, firm with about $1.1 billion in client assets led by founder Mark Anderson. The eight-person team will adopt Captrust branding and deepen the firm's existing Washington presence. It is Captrust's tenth announced deal of 2026, following a $3 billion Winston-Salem team and a $1.2 billion Long Island pair, as the employee-owned platform keeps up a brisk acquisition pace.

M&A

Wealthspire Division Acquires $1B Wealth Manager in London

Ground Control, Wealthspire's entertainment and sports business-management division, acquired Atlantic Swiss, a London firm with more than $1 billion in assets under management and administration serving clients in film, media and sports. CEO Craig Bell stays on as president. The deal expands Wealthspire's U.K. footprint under Madison Dearborn ownership and adds to a growing list of U.S. RIAs pursuing cross-border acquisitions.

M&A

Elevation Point Stakes $750M Ex-UBS Team in Las Vegas

Elevation Point, the minority-investment platform launched by former Sanctuary CEO Jim Dickson, took a stake in Truing Capital Advisors, a roughly $750 million Las Vegas team that left UBS. The founders retain control while gaining capital and support, with custody at Goldman Sachs. Elevation Point is targeting $50 billion in assets within two years and plans to raise additional capital to get there.

M&A

South Atlantic Bancshares to Acquire Eastover Capital Management

South Atlantic Bancshares, the roughly $2 billion parent of Myrtle Beach-based South Atlantic Bank, agreed to acquire Eastover Capital Management, an employee-owned Charlotte firm managing $430 million. The deal marks the bank's entry into wealth management and adds portfolio management for individual and institutional clients, another sign that community banks see RIA acquisitions as a route to fee income.

M&A

Kintra Wealth Adds $355M Great Scott Financial Practice

Kintra Wealth, the advisor-owned RIA formed in April by six former Commonwealth teams, added Scott Seymour's Great Scott Financial Services and its roughly $355 million in client assets from LPL. Seymour joins as a partner and gains shared investment, operations and compliance resources. Kintra now oversees more than $4 billion, showing how Commonwealth breakaways are becoming acquirers in their own right.

M&A

WPCG-Backed Apella's 31st Deal Is for $332M Maryland RIA

Apella Wealth, a $12.5 billion West Hartford, Connecticut, RIA, acquired Kilner Capital Advisors, a Gaithersburg, Maryland, firm with about $332 million in assets. Founder Joe Kilner joins as partner with two team members. It is Apella's 31st transaction and its 20th backed by Wealth Partners Capital Group, underscoring the minority-capital model's role in fueling mid-size consolidators.

M&A

Modern Wealth Adds $330M Lodi Planning Team

Monterey-based Modern Wealth Management acquired 4thGEN Wealth Management, a three-advisor Lodi, California, team with about $330 million in AUM serving business owners, agricultural families and retirees. The deal follows last month's purchase of $290 million AWA Wealth Management and continues Modern Wealth's busy 2026 as it builds density across Northern California.

M&A

Captrust Adds RHA Wealth Advisors in Raleigh

Captrust brought on RHA Wealth, a Raleigh team managing more than $300 million for about 190 clients that was previously a Sanctuary Wealth partner firm. Co-founders Clark Abbott and Robert Hartinger and three colleagues will work from Captrust's headquarters under its brand, citing the firm's employee ownership and planning-first approach as deciding factors.

M&A

Echelon: PE-Backed Buyers' Deal Volume Dips as RIA M&A Stays Strong

Echelon Partners counted 125 RIA transactions in the third quarter, tying for the second-busiest quarter on record and keeping 2026 on pace to top 500 deals versus 466 last year. Private-equity-backed acquirers accounted for 73.6% of deals, down from 75.8%, while average deal size fell as serial buyers favored sub-$1 billion tuck-ins. DeVoe's competing count showed a sharper Q3 slowdown.

M&A

LPL Lowers Commonwealth Asset Retention to 83%

Weeks ahead of converting Commonwealth Financial Network advisors, LPL cut its expected asset retention to 83%, down from 85% last quarter and an original 90% target, as some advisors who had committed reversed course. LPL still projects about $415 million in run-rate EBITDA, implying roughly 8x on the purchase price. Shares fell nearly 13% after the update.

TALENT

RIA M&A Veteran Joins Accelerated Wealth Partners to Drive Deal Growth

Accelerated Wealth Partners hired Josh Bronfman as managing director of M&A and investments to lead deal activity and support partner firms on acquisitions and recruiting. Bronfman spent five years on Focus Financial Partners' M&A team after roles at Brookfield and Goldman Sachs. The hire follows a $200 million capital commitment from J.C. Flowers as the firm shifts to active portfolio-building.

TALENT

AlphaCore Names Former Corient Executive as CFO

La Jolla-based AlphaCore Wealth Advisory appointed Craig Cardwell chief financial officer, overseeing its acquisition program, capital structure and financial reporting. Cardwell was previously a regional CFO and partner at Corient Private Wealth and earlier worked at RGT Wealth Advisors. The appointment adds deal-finance depth as AlphaCore keeps acquiring, including its recent $400 million Blue Rock deal.

TALENT

Sowell Names New CIO, Launches Investment Office

Sowell Management, a $6.8 billion North Little Rock, Arkansas, RIA, promoted Scott Dooley to chief investment officer to lead a new Office of the CIO. Dooley founded Fusion Investment Group and joined Sowell in 2025. The office pools research, portfolio construction and advisor consulting, which CEO Daryl Seaton framed as helping independent advisors compete with wirehouses and large RIAs.

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