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delivering investment strategies to high net worth clients. Based in Columbia, Maryland and founded in 1998, the firm works with private wealth clients in the Washington D.C. area

Jan. 06, 2020



BDO USA, LLP, one of the nation's leading accounting and advisory firms, is expanding its Wealth Advisory Practice in the Greater Washington, D.C. and Greater Baltimore markets through the addition of 10 partners and professionals from Biegel Waller Investment Advisory Services. The combination of BDO and Biegel Waller Investment Advisory Services was completed on January 1, 2020.

"BDO USA warmly welcomes the experienced team from Biegel Waller Investment Advisory Services as we expand our comprehensive wealth advisory services across the Atlantic region," said Stephen Ferrara, COO of BDO USA. "In today's volatile market, our wealth advisory clients rely on our investment professionals to preserve and enhance the wealth they've worked so hard to build. Biegel Waller's holistic approach to investment advisory through independent research and insightful

market analysis is a perfect complement to BDO’s existing wealth advisory practice.”

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generations to come,” said Mark Biegel, Co-Founder, Partner and Senior Portfolio Manager at Biegel Waller Investment Advisory Services. “We seek to minimize portfolio risk and maximize peace of mind for each individual and unique client. With BDO, our clients have even greater access to high-caliber, comprehensive wealth management services throughout the Atlantic region and across the country.”

“The combination of Biegel Waller Investment Advisory Services and BDO’s Wealth Advisory Practice provides clients of both firms with access to the full complement of advisory services that each firm brings to bear,” said Allan D. Koltin, CEO of Koltin Consulting Group, who advised both firms on the transaction.

“This expansion into Greater Washington D.C. and Baltimore further supports BDO’s targeted growth strategy. BDO will maintain Biegel Waller’s primary office at 10211 Wincopin Circle, Suite 300, in Columbia, Maryland.

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