

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

investment advisory services practice.

Sep. 01, 2022

The logo for Wipfli Financial Advisors is displayed on a solid blue rectangular background. The word "WIPFLI" is written in a large, white, serif typeface. Below it, the words "FINANCIAL" and "ADVISORS" are stacked vertically in a smaller, white, sans-serif typeface.

WIPFLI

FINANCIAL ADVISORS

Wipfli LLP, a national accounting and advisory firm, and Creative Planning LLC, one of the largest registered investment advisors in the country with \$225 billion in assets under management or advisement, announced on Aug. 17 that Creative Planning will acquire Wipfli's wealth management and investment advisory services practice, Wipfli Financial Advisors. Wipfli will take a minority stake in Creative Planning.

"This transaction creates a strategic relationship that will allow our clients to access a broad set of services through innovative financial platforms," said Kurt Gresens,

managing partner and chairman of the board of Wipfli LLP.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Transaction terms were not disclosed, and the timing of closing is subject to certain approvals and conditions. Ardea Partners LP served as exclusive financial advisor to Wipfli Financial Advisors, and Alston & Bird served as legal counsel to Wipfli Financial Advisors.

The sale only involves Wipfli's subsidiary, Wipfli Financial Advisors and its wealth management services. It does not include any other clients, associates or services.

Advisory • Firm Management

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved