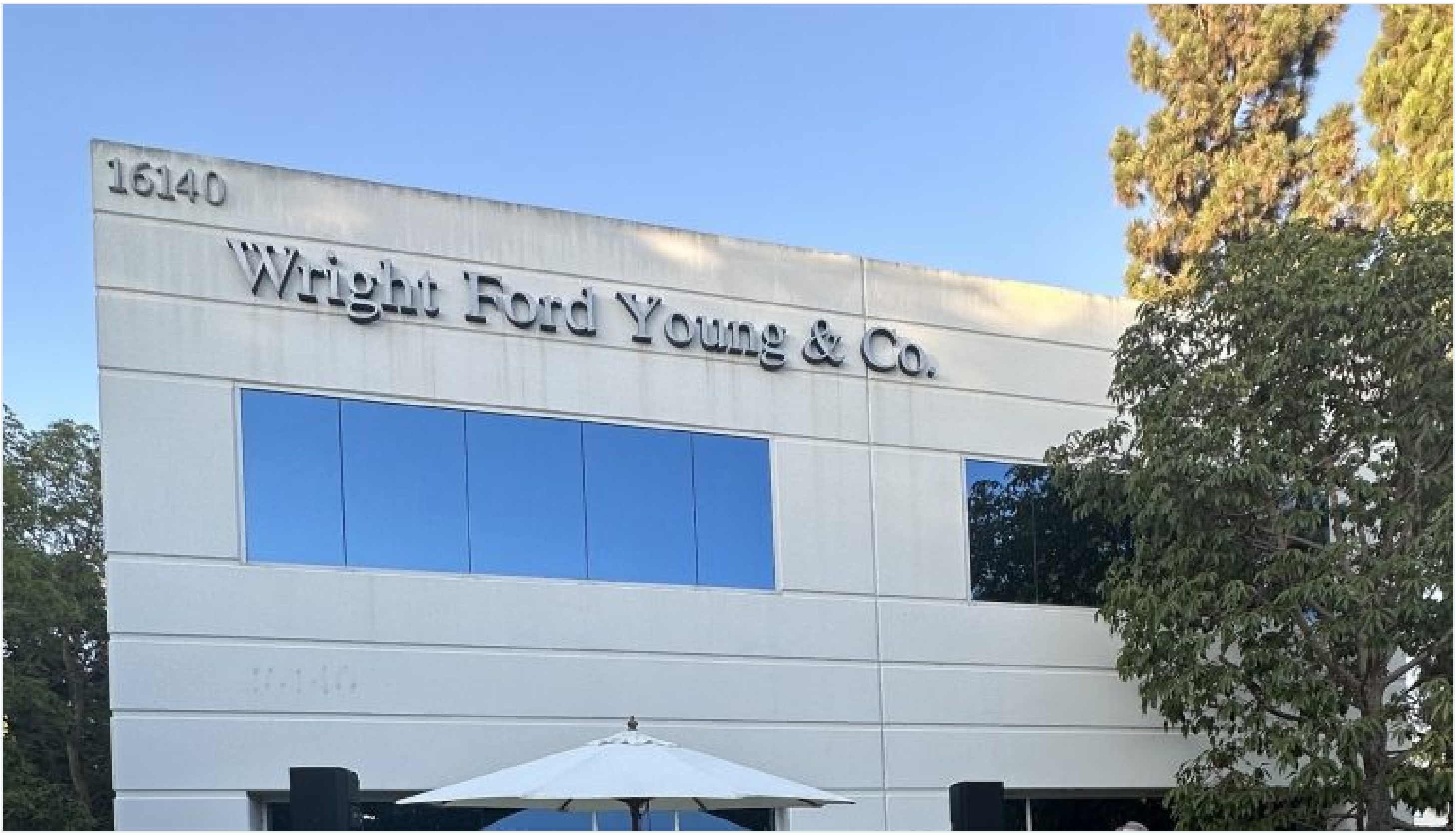
CPA
Practice Advisor

to launch WFY Wealth Management.

Jason Bramwell • Mar. 27, 2024



Irvine, CA-based accounting firm Wright Ford Young & Co. (WFY) has teamed with Integrated Partners, a national financial planning and registered investment advisory firm, resulting in WFY launching a new wealth management practice.

The wealth practice, WFY Wealth Management, says on its website, "Our client service, compassion, and integrity help us stand out from the sea of similarity in the financial services industry. We are an experienced Southern California wealth manager providing financial advocacy to families and businesses both nationally and internationally."

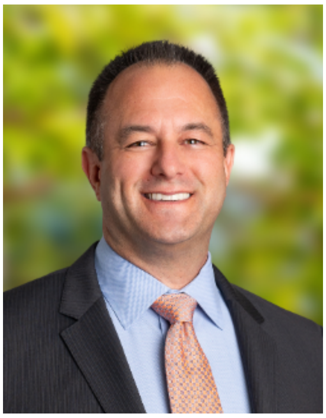
Founded in 1973, WFY touts itself as the largest single-office accounting firm in

architecture business environment: technology, investment management, advanced planning, CPA partner program, custody, marketing, public relations, M&A, succession planning, and comprehensive business counsel.

WFY Wealth Management is the result of a collaborative effort between Jeff Myers, managing partner at WFY; Paul Saganey, founder and president of Integrated; and certified financial planner Brad Tedrick, who will serve as the wealth manager at WFY Wealth Management.

With nearly three decades of expertise in the financial services industry, Tedrick brings a wealth of relevant knowledge to his new role. As a business owner himself, he specializes in retirement income planning, investment management, and business owner growth and exit planning. In his role as a wealth manager, he will also collaborate with the firm’s CPAs to offer a holistic view of clients’ financial situations.

Joining Tedrick is another CFP, Luke Schork, who will utilize Integrated’s suite of back-office services—including solutions for business owners, familiy office services, and retirement plan administration—to enhance the overall client experience.



Jeff Meyers

“We’re thrilled to introduce this new wealth management service to our clients at

Wealth Management is poised to be the preferred destination for addressing these needs,” Saganey added. “With this collaboration, Wright, Ford & Young clients can now connect with seasoned wealth advisors who are ready to collaborate and offer expert guidance, addressing the intricacies of their financial lives and goals.”

Last November, Integrated started a similar strategic partnership with Californian accounting and advisory firm Windes in order to launch Ovisto Wealth Management.

Accounting • Firm Management • Mergers and Acquisitions