

Mercer Advisors Acquires ACG Wealth, Inc.

Acquisition of ACG Wealth, Inc. Expands Mercer Advisors' Georgia Footprint



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Mercer Global Advisors Inc. →
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DENVER, Nov. 2, 2021 /PRNewswire/ -- Mercer Global Advisors, Inc. ("Mercer Advisors"), a national Registered Investment Adviser (RIA), today announced the acquisition of ACG Wealth, Inc. ("ACG"), a respected wealth management firm headquartered in Atlanta, Georgia. ACG serves clients with assets under management / advisement (collectively "AUM") of approximately \$1.3 billion. ACG was founded in 2002 by Jeffrey T. Shaver ("Jeff") and Joseph P. Young, Jr. ("Jody"), both Founding Partners. ACG offers comprehensive wealth management services to its high-net-worth individuals, families, and their businesses. Jeff, Jody, and their 17 staff members will be joining Mercer Advisors.

ACG's mission is to deliver transparent, personalized financial support that puts our clients' needs first. We truly believe that everyone should have a plan; regardless of how much money you have or your stage in life. The team behind ACG is made up of qualified financial professionals who are passionate about helping individuals and families achieve their ideal retirements by providing the framework and planning necessary to achieve those goals.

Commenting on the transaction, Founding Partner Jeffrey T. Shaver stated: "We were looking to build out our middle and back office to support our rapid growth. Before starting that re-building effort, we were introduced to Dave Barton, Vice Chairman and Head of M&A at Mercer. Dave talked to us about joining Mercer and its platform business as they had already successfully built out all the departments and disciplines we were seeking to add. Dave explained we could build it ourselves but why risk failure when you can join a national player that had achieved proof of



concept. As Dave Barton stated, 'why build it when you can join it,' and we agreed." Founding Partner Joseph P. Young, Jr. added: "For me, it was about expanding our value proposition to our clients and doing so by adding more in-house services. Mercer Advisors had already built-out a turn-key family office complete with in-house departments focused on delivering estate planning, tax return preparation and corporate trustee services. The decision for us, our clients and staff was obvious."

Dave Barton, Vice Chairman who led this transaction on behalf of Mercer Advisors added: "Jeff and Jody have built a fast-growing business but were looking for the corporate architecture necessary to make their business hum with high proficiency. We added the 'hum' and together we present a formidable team expanding our already dominant presence in Atlanta and Southeast generally."

Dave Welling, Chief Executive Officer of Mercer Advisors said, "Jeff and Jody have built an impressive multi-location business with a talented team behind them. This is the type of talent we seek to add to our team, and we look forward to offering additional services to help better serve the ACG clients."

Cambridge International Partners LLC, served as exclusive financial advisor to ACG Wealth, Inc.

About Mercer Advisors

Established in 1985, Mercer Global Advisors Inc. ("Mercer Advisors") is a total wealth management firm that provides comprehensive, fee-based investment management, financial planning, family office services, retirement benefits and distribution planning, estate and tax planning, insurance solutions, and corporate trustee and trust administration services. Mercer Advisors Inc. is a parent company of Mercer Global Advisors Inc. (RIA), majority owned by both Oak Hill Capital and Genstar Capital, one of the largest Registered Investment Advisors and financial planning firms in the U.S. with \$33.5 billion in client assets. Headquartered in Denver, Mercer Advisors is privately held, has over 560 employees, and operates nationally through 55+ offices across the country. For more information, visit www.merceradvisors.com.

Data as of September 30, 2021. AUM includes affiliates and wholly owned subsidiaries.

Mercer Global Advisors Inc. is registered with the Securities and Exchange Commission and delivers all investment-related services. Mercer Advisors Inc. is the parent company of Mercer Global Advisors Inc. and is not involved with investment services.

Mercer Advisors is not a law firm and does not provide legal advice to clients. All estate planning documentation preparation and other legal advice is provided through its affiliation with Advanced Services Law Group, Inc. National Advisors Trust Company, FSB (NATC) provides estate settlement and corporate trustee services. ASLG and NATC are separate and distinct from each other and Mercer Global Advisors Inc and require separate agreements to engage their services.

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