



Investment Adviser Representative David Elder Sr. Joins Merit Financial Advisors

November 1, 2022

Merit Financial Advisors (“Merit”), a Georgia-based financial advisory firm that specializes in financial planning and wealth management solutions for high-net-worth individuals and families and those navigating life transitions, announced today that financial advisor David Elder Sr., CFP®, has joined the team. David, who is headquartered in Atlanta, has a longstanding book of business and brings nearly \$30 million in total assets.

David will join Merit as a Wealth Manager, and Merit will work with David to provide back-office support and an expanded service offering. The firm will also assist with supporting David’s existing client relationships. David’s son, David Elder Jr., CFP®, has been a Wealth Manager at Merit for nearly 15 years, and he will assist with his father’s transition to Merit.

Earlier this quarter, Merit announced the acquisition of Triad Financial Strategies, its eleventh acquisition since taking a minority investment in December 2020 from Wealth Partners Capital Group (“WPCG”) and a group of strategic investors led by HGGC, leveraging its Aspire Holdings platform.

The acquisition was finalized on November 1, 2022. Financial and legal terms of the deal were not disclosed.

For more information, please visit <https://www.meritfinancialadvisors.com/for-advisors/>