

Apella Wealth Expands West Coast Presence with Addition of Inspired Financial™ - Wealth Management Firm from Huntington Beach, CA Brings \$275 Million in AUM

GLASTONBURY, Conn. — July 10, 2023 — Apella Capital, LLC, DBA Apella Wealth (Apella), a financial advisory and wealth management firm serving individuals, families, and businesses, announced today that Inspired Financial, a registered investment advisor (RIA), has joined the firm. This acquisition establishes Apella’s presence in Huntington Beach, CA, and adds to its regional financial planning and investment management capabilities.

Founded and led by Evelyn Zohlen, [Inspired Financial](#) provides comprehensive wealth management services, empowering clients—primarily women and families—to navigate their financial lives with confidence and seek to achieve their financial goals.

With this acquisition, Inspired Financial clients will gain access to the broad range of resources, enhanced technology, and expanded services offered by Apella. The entire Inspired Financial team will join Apella, and Evelyn Zohlen will assume the role of Regional Director and Senior Financial Planner.

“We’re thrilled to have Evelyn and her team join the Apella family. They are seasoned industry veterans who similarly have been practicing evidence-based investing and planning for decades, so they are a perfect fit for us to continue growing our West Coast presence,” said Apella CEO Patrick Sweeny.

“For 20 years, Inspired Financial has taken pride in serving clients—particularly women in transition—through comprehensive financial planning in a close relationship that not only gives them confidence through a plan for their financial future but also empowers them to take charge of it,” adds Evelyn Zohlen. “It’s a true pleasure to discover that Apella shares this approach to service and relationships. Through this combination, we are excited to further elevate our team, our profession and most importantly, the client experience.”

This is Apella’s second acquisition of 2023 and fourth jointly with Wealth Partners Capital Group (WPCG), a financial services holding company that invested in Apella in September 2021. Earlier this year, Apella announced its acquisition of Clarity Wealth Management in Irvine, CA.

The acquisition closed on June 30, 2023, and will increase Apella's assets under management by approximately \$275 million. David Selig of Advice Dynamics Partners served as Inspired Financial's M&A advisor. Financial and legal terms of the deal were not disclosed.

About Apella Wealth

Apella Wealth (Apella) was founded in 2014 by two financial advisors, CEO and Co-Founder Patrick Sweeny, and Chairman and Co-Founder David Connelly, who are passionate about finding a better way to help investors achieve their long-term goals. Apella is a national RIA built around a select community of like-minded advisors who believe in Evidence-Based investing and planning. Headquartered in Glastonbury, CT, Apella offers its wide range of financial advisory services across several financial advisory offices, spanning both coasts and serving thousands of individual and institutional investors. Managing over \$2.7 billion* AUM, the firm's financial advisors are dedicated to building lifelong client relationships and providing Advice for Life. For more information about Apella, please visit apellawealth.com.

*As of 12/31/2022 (assets under management and administration)

About Wealth Partners Capital Group

Wealth Partners Capital Group (WPCG) is a financial services holding company that invests in and partners with select leading wealth management firms. WPCG assists its partner firms by identifying and integrating like-minded registered investment advisers and financial advisors who are seeking access to expanded business capabilities, strategic growth, and customized transition solutions. For more information, please visit wealthpcg.com.

Media Contact

Michelle Margo
Director of Marketing
mmargo@apellawealth.com
860-734-2045

Apella Capital, LLC is an investment advisory firm registered with the Securities and Exchange Commission. The firm only transacts business in states where it is properly registered or excluded or exempted from registration requirements. The information here is provided for general information purposes only and should not be considered a recommendation or personalized investment advice.