



Merit Financial Advisors Partners with Kizer & Associates to Expand Its Presence in the Midwest

ATLANTA — August 19, 2024 — [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 it has acquired Kizer & Associates (“Kizer”). The firm, based in Barrington, IL, will establish Merit’s first Illinois office and increase Merit’s assets by \$180 million.

Kizer specializes in investment management and financial and estate planning and is led by Garland (“Brent”) Kizer, CFP® and Frank Vitale, CRPC®. Both Brent and Frank will assume new roles at Merit as Partners and Wealth Managers and will be joined by their Client Services Associate, Josefina Harris.

“Partnering with Merit has provided an opportunity to realign our business strategy in order to benefit our clients,” said Brent. “We can now offer increased services, reduced advisory fees and enhanced support while utilizing more advanced technology to achieve better outcomes for our clients.”

This is Merit’s twenty-eighth acquisition since taking a minority investment in December 2020 from Wealth Partners Capital Group (“WPCG”) and a group of strategic investors led by HGGC’s Aspire Holdings platform. Last month, Merit announced its acquisition of Westfield Financial Planning, which added approximately \$207 million in assets and expanded Merit’s presence in New Jersey.

“We are excited to welcome Brent, Frank, and Josefina to the team,” said Joshua and Zachary Mersberger, Regional Directors at Merit. “This expansion marks a key milestone for Merit, establishing the firm’s presence in Illinois. As Merit continues to grow, the firm remains committed to helping its clients navigate life’s challenges, transitions, and successes.”

The merger was finalized on August 9, 2024. Financial and legal terms of the deal were not disclosed.

About Merit Financial Advisors

Merit Financial Group, LLC, doing business as Merit Financial Advisors (“Merit”), is a national wealth management firm that supports both the independent broker-dealer and RIA models. Merit exists to enrich the lives of those they serve, and its mission is to revolutionize the client experience by building the RIA of the future. Based in Atlanta, Georgia, Merit has over 40 offices throughout the U.S. and managed \$11.84 billion in assets as of June 30, 2024 (\$8.8 billion in advisory, \$2.8 billion in brokerage assets, and \$253 million in assets under advisement). For more information, please visit www.meritfinancialadvisors.com.

Investment advice offered through Merit Financial Group, LLC, an SEC registered investment adviser.



About Wealth Partners Capital Group

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

About HGGC

HGGC is a values-driven, partnership-focused private investment firm. The firm's ecosystem of investors, operators, and professionals are united by the shared mission to develop leading enterprises and build long term value together. HGGC invests in technology, business services, financial services and consumer enterprises generally valued between \$200M – \$1.5B+. The firm is based in Palo Alto, CA and manages over \$6.9 billion in cumulative capital commitments. Since its inception in 2007, HGGC has completed more than 600 platform investments, add-on acquisitions, recapitalizations, and liquidity events with an aggregate transaction value of over \$71 billion. HGGC makes investments in RIAs via its Aspire Holdings platform, which is targeting \$300 million of total investment in the space. More information, including a complete list of current and former investments, please visit www.hggc.com.

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