**Apella Wealth Expands Gulf Coast Presence with Addition of Pembroke Advisors, Inc.**

*Houston, TX-based wealth management firm expands regional presence*

WEST HARTFORD, Conn. — October 1, 2024 — Apella Capital, LLC, DBA Apella Wealth ("Apella, Apella Wealth"), a financial advisory and wealth management firm serving individuals, families, and businesses, announced today that Pembroke Advisors, Inc. ("Pembroke"), a registered investment advisor ("RIA"), has joined the firm. This acquisition establishes Apella's presence in the greater Houston, TX area, and adds to its regional financial planning and investment management capabilities.

Founded and led by Ross Richardson, Pembroke provides comprehensive wealth management services, empowering clients to navigate their financial lives with confidence and achieve their financial goals.

"We are pleased to welcome Ross to the Apella family. With his extensive experience in evidence-based investing and planning, Ross is a perfect addition to our team," said Apella CEO, Patrick Sweeny.

Ross Richardson said, "I could not be more thrilled about partnering with Apella. I'm so happy to have made this connection to continue the journey for my clients, and for me. I know that Apella is a perfect fit for all of us, and I can't wait to see what lies ahead."

This is Apella's eighteenth acquisition, and seventh since partnering with Wealth Partners Capital Group ("WPCG"), a financial services holding company that invested in Apella in September 2021.

The acquisition closed on October 1, 2024. As of closing, Apella has $4.3 Billion in assets under management.

**About Apella Wealth**

Apella Wealth was founded in 2014 by two financial advisors, Patrick Sweeny and 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 detailed financial planning. Headquartered in West Hartford, 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. The firm's financial advisors are dedicated to building lifelong client relationships and providing Advice for Life. For more information about Apella, please visit www.apellawealth.com.

**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.



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