



CHOREO COMPLETES PARTNERSHIP WITH GREERWALKER LLP BY CLOSING ACQUISITION OF GREERWALKER WEALTH LLC

CHICAGO – Jan. 31, 2023 – [Choreo, LLC](#) (“Choreo” or “the firm”) today announced it has completed a previously announced agreement to acquire [GreerWalker Wealth LLC](#), an entity affiliated with GreerWalker LLP.

The acquisition brings Choreo’s assets under management and advisement to approximately \$14.8 billion¹. GreerWalker Wealth, which is based in Charlotte, North Carolina, has approximately \$275 million in assets and the deal represents a second expansion of Choreo’s footprint in the Southeast. Terms of the transaction were not disclosed.

“Completing this acquisition builds on our strong momentum of success over the past year, as we continue developing this firm into a destination of choice for advisors nationwide,” said [Michael Radford](#), Managing Director at Choreo. “Our partnership with GreerWalker LLP also aligns with our mission of helping solve for the complex tax, wealth, financial and estate planning needs of clients.”

As part of the deal, Choreo and GreerWalker LLP have established an ongoing strategic partnership to help accelerate growth for their respective businesses and create new opportunities for their financial professionals and clients. The GreerWalker Wealth advisor team will report to Mr. Radford, who is also based in Charlotte.

“GreerWalker and Choreo have complementary models and philosophies that make this a natural partnership with the potential for long-term mutual benefits,” said [John Norman](#), Managing Partner at GreerWalker LLP. “We look forward to leveraging the full suite of technology and operations expertise available to better serve our clients.”

With the completion of this acquisition, GreerWalker Wealth’s clients can continue working with the professionals they know and trust, receiving the same financial planning and wealth management services.

The finalization of this agreement with GreerWalker comes as Choreo has made two previous deals to acquire other wealth management firms in 2022, including Cherry Bekaert Wealth Management and Enso Wealth Management.

This represents the third acquisition by Choreo since Parthenon Capital, together with Choreo management and advisors, purchased the company from one of the largest CPA and professional services firms in the country in February of 2022.

¹ Approximate post-close number; also includes assets related to the [two other previously announced acquisitions](#) of Enso Wealth Management and Cherry Bekaert Wealth Management expected to add \$2.8 billion in assets under management and advisement upon closing of those transactions. As of April 30, 2022, \$11.8B constitutes Choreo’s regulatory assets under management or advisement. As of September 30, 2022, GreerWalker Wealth managed

approximately \$275M of assets.

About Choreo, LLC

Choreo is an independent firm focused on redefining the RIA's place in the wealth advisory industry. Passionate about improving the well-being of clients, their families and their communities, Choreo operates out of 28 locations across the country. Choreo's experienced advisors define, design and build solutions for their clients' financial and related needs so they can focus on what matters most to them. Originally launched over 20 years ago as a subsidiary of one of the largest CPA and professional services firms in the country, Choreo serves over 3,600 families with approximately \$11.8 billion of assets under management or advisement (as of April 2022). For more information, visit choreoadvisors.com.

Choreo, LLC is a limited liability company that provides investment advisory services, financial planning, and other wealth management services to individuals and businesses. Choreo, LLC is an SEC-registered investment adviser. Registration as an investment adviser does not imply any skillset of the wealth manager and/or its advisors.

About GreerWalker LLP

GreerWalker LLP provides tax, accounting, and advisory services focused on the needs of privately held middle-market companies and their owners throughout the US and around the globe. Through their affiliate, GreerWalker Wealth LLC, an SEC-registered investment advisor, they offer customized wealth planning for every stage of life. Their affiliate GreerWalker Corporate Finance LLC offers exit planning and merger and acquisition services to complete the business life cycle. With over 120 associates, they are one of the ten largest CPA firms in their region and among the top 200 CPA firms in the United States. They have repeatedly been recognized as one of the nation's "Best of the Best" accounting firms by Inside Public Accounting based on their overall superior financial and operational performance. For more information, visit GreerWalker.com.

About GreerWalker Wealth LLC

GreerWalker Wealth LLC is registered as an investment adviser. As of September 30, 2022, the Firm served high net worth individuals and retirement plans with approximately \$275 million under management or advisement. GreerWalker Wealth LLC offers to its clients (individuals, high net-worth individuals, pension and profit-sharing plans, charitable organizations, etc.) portfolio management services, financial planning services, financial consulting services, and retirement plan services. For more information, visit GreerWalker.com.

Media inquiries

Joseph Kuo / Michael Dugan

Haven Tower Group

424 317 4851 or 424 317 4852

jkuo@haventower.com or mdugan@haventower.com