Waverly Advisors Acquires Pacific Portfolio

*Waverly expands to the West Coast*

BIRMINGHAM, Ala. — November 3, 2025 — Waverly Advisors, LLC ("Waverly"), a federally registered investment adviser ("RIA") specializing in investment management, financial planning, and wealth management solutions for high-net-worth individuals, corporate retirement plans, and institutional clients, has acquired Pacific Portfolio Consulting, LLC ("PPC"), a Seattle-based wealth management firm, and Pacific Portfolio Trust Company ("PPTC"), a Washington state-chartered trust company (PPTC together with PPC, "Pacific Portfolio"). This transaction marks Waverly's expansion into the Pacific Northwest.

Founded in 1992 by Larry, Pacific Portfolio has over 30 years of experience in comprehensive wealth planning, trust services, and institutional consulting. This strategic acquisition introduces a new service line to Waverly, expanding the firm's capabilities to include enhanced trust services. In addition, the partnership strengthens Waverly's corporate retirement plan solutions, reinforcing Waverly's commitment to delivering holistic financial guidance. The entire Pacific Portfolio team has joined Waverly, and the acquisition adds approximately $5 billion in AUM, marking a significant milestone in Waverly's continued growth.

"This partnership aligns with Waverly's commitment to continuously enhance the client experience. The addition of Pacific Portfolio's trust services will further strengthen our ability to serve clients effectively," said Justin Russell, President and CEO of Waverly. "Together, we can provide comprehensive wealth management solutions to clients from coast to coast."

"Partnering with Waverly Advisors allows us to combine our deep local expertise with a national platform dedicated to long-term client success," said Larry Hood, Co-founder and CEO of PPC and CEO of PPTC. "This collaboration enables us to provide more comprehensive solutions while maintaining the personalized attention our clients expect. Waverly Advisors commitment to clients, Values and Cultures align with our making them a great partner as part of our succession plan for our client's and associates."

The acquisition of Pacific Portfolio marks Waverly's 26th transaction since accepting an equity investment in December 2021 from Wealth Partners Capital Group ("WPCG") and HGGC's Aspire Holdings platform. The transaction of Pacific Portfolio Consulting, LLC closed on September 26, 2025, and increased Waverly's AUM to approximately $25.1 billion. The transaction of Pacific Portfolio Trust Company closed on October 31, 2025.

"On behalf of the Waverly team, we continue to seek best-in-class advisory firms across the nation," said Nick Trepp, Partner, Head of Corporate Development at WPCG. "We continue to prioritize Waverly's M&A initiatives as the firm expands to new markets like the Pacific Northwest."

Financial and legal terms of the deal will not be disclosed.

## About Waverly

Waverly Advisors, LLC ("Waverly") is a fee-only federally registered investment adviser that serves the investment management and wealth planning needs of a diverse group of clients, including high-net-worth individuals and families, retirement plans, trusts, endowments, and institutions. Waverly manages approximately $25.1 billion in assets (as of 9.26.2025) and offers collaborative investment, tax, estate, and financial planning services. Founded in 1999 in Birmingham, Alabama, the company has 42 offices across the U.S. and a team of over 320 professionals who hold many of the industry's most prestigious credentials. For more information, please visit www.waverly-advisors.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.

## 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. For more information, including a complete list of current and former investments, please visit www.hggc.com.

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