



Peachtree Investment Advisors Joins United Capital to Offer Cutting-Edge Client Experience

Acquisition brings next-generation financial life management technology to firm's clients

ATLANTA, Ga. and NEWPORT BEACH, Calif, March 29, 2019 — [United Capital Financial Advisers LLC](#) (“United Capital”), the country’s first and largest [financial life management firm](#), today announces its further expansion into the Atlanta area with the acquisition of [Peachtree Investment Advisors](#), a registered investment adviser (RIA) in Atlanta, GA. Peachtree will join the United Capital team and use United Capital’s groundbreaking financial life management technology to offer an improved, modern client experience and drive growth goals.

“It’s gratifying to welcome forward-looking firms like Peachtree to our team,” said [Matt Brinker](#), United Capital’s chief business development officer. “We’re eager to leverage our resources to provide the high net worth, multi-generational households they serve with a truly indispensable client experience.”

Established in 2006, Peachtree Investment Advisors manages \$350 million in assets and serves 100 high-net worth households and entities with a focus on comprehensive wealth management. Peachtree’s four employees will join United Capital, with Mike Wolf, Wes French and Mark Stancil serving as managing directors.

“United Capital is an innovative company with a financial life management focus that we believe is years ahead of the competition. The combination of our high-touch service along with leading edge technology enables us to better serve clients for the long-run and we are excited to be part of the United Capital family” Wolf said.

Peachtree’s culture of looking at the big picture of their clients’ financial lives resonated with United Capital. The firm’s three partners, all over age 50, joined United Capital to secure the succession of their business and to leverage United Capital’s bench strength, vision and technology. Armed with these resources, Peachtree’s advisors can stay engaged with the families they serve in the long run.

“Our relationships with clients run deep. The added resources that United Capital provides as well as financial tools like [MoneyMind](#) and [HonestConversations](#) will allow us to better organize and improve our clients’ financial lives as we continue to grow our business” said Wes French.

“From an investment management perspective, United Capital offers additional research, due diligence and investment offerings. We are particularly excited about their capabilities and



access within the alternative investing space – an area of increasing importance to high-net-worth clients” added Stancil.

“This acquisition validates our vision of financial life management,” said [Joe Duran](#), Founder and CEO of United Capital. “The Peachtree team understands the best and greatest use of their time is to help their clients come to grips with the highly complex, big picture issues that touch every aspect of their financial lives. We look forward to helping them live richly.”

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About United Capital Financial Partners

United Capital Financial Partners, Inc., the parent company of United Capital Financial Advisers, LLC (“United Capital”) and its consulting affiliate, is an independent financial life management firm, ranked #2 in the [Barron’s 2018 list of Top 40 Independent Financial Advisors](#). United Capital is a registered investment advisor (RIA) offering clients objective advice and an open architecture platform that enables a wide array of investment management solutions tailored specifically to client needs. Today, United Capital has approximately \$23 billion in assets under management and 95 offices nationwide. For more information, please visit www.unitedcp.com.