

# Creative Planning Acquires OptiFour

Creative Planning Completes Its 3<sup>rd</sup> Acquisition This Year

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CREATIVE PLANNING, INC.  
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OVERLAND PARK, KANSAS, November 12, 2019 /PRNewswire/ -- Creative Planning Inc. ("Creative Planning"), one of the nation's largest Registered Investment Advisers (RIA), today announced the acquisition of OptiFour, a RIA firm located in McLean, Virginia. OptiFour provides financial planning, investment management, trust, legal and tax services and has approximately \$400 million of Assets Under Management.

Peter Mallouk, Chief Executive Officer of Creative Planning, said, "We are excited to welcome Mark Cohen, Wes Burnett and the OptiFour team. Mark and Wes have spent decades building a practice that provides their clients with services that touch on all the key aspects of their financial lives, an approach Creative believes in and shares."

"We are ready to become part of this first-class organization that shares our commitment to holistic wealth management as well as a fiduciary commitment to putting our clients' interests first," said Mark Cohen, co-Principal of OptiFour. Wes Burnett co-Principal of OptiFour added, "The financial landscape is changing quickly and we knew it was time to align with a national firm that could best help us support the needs of our clients. We care deeply for our clients, many of whom have been with us for decades, and took our search very seriously. Creative Planning was unmatched in its ability to deliver experience and scale when it comes to offering family office services to high net worth individuals."

Peter Mallouk, CEO of Creative Planning, said, "Mark and Wes have done a remarkable job building a firm that, like Creative, looks to help clients in all aspects of their financial lives. They have been doing this not because the market forced them to, but rather for decades, simply because it was the right thing to do. We are proud to have them on our team."

OptiFour was represented by DeVoe & Company. Creative Planning was represented by Republic Capital Group.

## **About Creative Planning**

Established in 1983, Creative Planning, Inc. is an independent wealth management firm that provides a financial planning led investment management approach, retirement planning, estate planning, trust services, tax advice and family office services for individuals as well as 401(k) and institutional money management. Creative Planning manages approximately 38 billion in assets for individuals and families in all 50 states.

Data as of November 12th, 2019.

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