

Creative Planning to Acquire Hogan Financial

Creative Planning Announces Its 4th Acquisition of 2019, Expanding in Milwaukee Market

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OVERLAND PARK, KANSAS, December 3, 2019 /PRNewswire/ -- Creative Planning Inc. ("Creative Planning"), one of the nation's largest Registered Investment Advisers ("RIA"), today announced the pending acquisition of Hogan Financial Management LLC ("Hogan Financial"), an RIA firm located in Milwaukee, Wisconsin. Hogan Financial provides comprehensive financial planning and investment management for clients with approximately \$300 million in Assets Under Management.

Peter Mallouk, Chief Executive Officer of Creative Planning, said, "Paula Hogan has spent her career building a first-class practice. Along with her partner, Clint Wondra, they have established one of the strongest, longest running independent wealth management firms in Milwaukee. While Creative Planning already has a substantial presence in Wisconsin, the addition of Hogan Financial will augment our plans to become far more competitive in that market. We are delighted to have them join our team."

Paula Hogan, founder of Hogan Financial, said: "Clint and I embarked on a lengthy and deliberate process to find a partner who aligns with our approach, values and principles especially as the wealth management landscape continues to change at an accelerating rate. Creative Planning shared our vision and commitment to clients, while also having the leadership and resources to navigate the future and a proven model to do so. On a more personal note, I am thrilled to be joining Creative Planning and look forward to continuing what I do best, working with clients and supporting fiduciary planning in our industry."

Peter Mallouk went on to say, "Paula and Clint embody the values we cherish most: a deep understanding of clients and their requirements, a consultative, needs-based view towards investing and a naturally collaborative approach. It is a privilege to have the Hogan Financial team join Creative Planning."

Hogan Financial was represented exclusively in this transaction by Park Sutton Advisors, LLC and received legal counsel from Dykema Gossett PLLC.

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 \$45 billion in assets for individuals and families in all 50 states.

Data as of December 3rd, 2019.

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