

Creative Planning Acquires Stratford Consulting

Creative Planning Expanding in Dallas Market

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Creative Planning

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OVERLAND PARK, Kan., Jan. 22, 2020 /PRNewswire/ -- Creative Planning LLC. ("Creative Planning"), one of the nation's largest Registered Investment Advisers ("RIA"), today announced the acquisition of Stratford Consulting, an RIA firm located in Addison, Texas. Stratford Consulting provides comprehensive financial planning and investment management for clients with approximately \$618 million in Assets Under Management.

Peter Mallouk, Chief Executive Officer of Creative Planning, said, "Susan Schildt and Michael Hemp have built a remarkable practice with a best in class reputation serving high net worth individuals. While Creative Planning already has a substantial presence in the Dallas Metro, the addition of Stratford Consulting will augment our plans to become far more competitive in that market. We are delighted to have them join our team."

Susan Schildt, Managing Principal of Stratford Consulting, said: "As a boutique comprehensive financial planning RIA, we did not anticipate finding that a national firm would be a fit for us. In Creative Planning we have found a company with deep resources and an outstanding reputation that also shares our view of how to best treat and work with clients. We could not be more excited about joining the Creative Planning team."

Peter Mallouk went on to say, "Susan and Mike embody the values we cherish most: a consultative, needs-based view towards investing and a naturally collaborative approach with their clients. It is a privilege to have the Stratford Consulting team join Creative Planning."

Stratford Consulting was represented exclusively in this transaction by Republic Capital Group.

About Creative Planning: 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 \$48 billion in assets across all 50 states.

Data as of January 20, 2020.

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