

Firm News | July 8, 2024

Troutman Pepper Counsels \$658M Michigan RIA, Gavin Financial Group, in Sale

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PHILADELPHIA – Troutman Pepper client Gavin Financial Group, a registered investment adviser (RIA) based in Midland, Michigan that manages over \$658 million in client assets, was acquired by Wealth Enhancement Group, a national independent wealth management firm. [Read a company press release about the RIA sale online here.](#)

Founded in 1996, Gavin Financial Group has served the Great Lakes Bay Region and beyond for over 27 years. The firm strives to provide financial freedom by assisting clients with comprehensive life planning and prudent investment management which allows them to pursue their dreams with confidence. The team of five works with pre-retirees, retirees, and high-net-worth families, and their goal is to assist multiple generations.

The Troutman Pepper team advising Gavin Financial Group in the acquisition was led by Partner [Mark Wilhelm](#) and included [Reid Oetting](#), [Danielle Clifford](#), and [Stefanie Brennan](#). The law firm has become a go-to for sell-side transactions involving RIAs and wealth management firms, with extensive experience navigating the intricacies particular to asset management mergers and acquisitions.

Consistently recognized as a top-tier national practice, Troutman Pepper's corporate attorneys regularly handle multimillion- and multibillion-dollar transactions. Core areas of service include capital markets transactions and other significant domestic and cross-border transactions, mergers and acquisitions, corporate governance, securities laws compliance, and corporate finance. The firm has particular expertise in the private equity and private fund services space, advising clients on matters from fund formation to investments and exit transactions.

About Troutman Pepper

Troutman Pepper is a national law firm with more than 1,100 attorneys strategically located in 20+ U.S. cities. The firm's litigation, transactional, and regulatory practices advise a diverse client base, from startups to multinational enterprises. The firm provides sophisticated legal solutions to clients' most pressing business challenges, with depth across industry sectors, including energy, financial services, health sciences, insurance, and private equity, among others. Learn more at troutman.com.

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