

Firm News | January 23, 2025

Troutman Pepper Locke Counsels Bogart Wealth in Minority Investment From Constellation Wealth Capital

RELATED PROFESSIONALS

[Mark T. Wilhelm](#) | [Reid W. Oetting](#) | [Michael T. Byrne](#) | [Howard S. Goldberg](#) | [Michael J. Crumbock](#) | [Dawn Hall](#)

RELATED OFFICES

[Philadelphia](#)

PHILADELPHIA – Troutman Pepper Locke client Bogart Wealth, an award-winning, independent wealth management and registered investment advisory firm with over \$3 billion in assets under advisement, including \$2.7 billion of assets under management, recently announced that it has closed on a minority, long-duration investment from Constellation Wealth Capital (CWC), a long-term strategic investor that provides capital solutions exclusively to wealth management businesses and multi-family offices. For more information, [read the press release](#).

This minority investment in Bogart Wealth will be used to further enhance its client services, technology solutions, recruitment initiatives, and marketing activities. Bogart Wealth will remain a proudly independent registered investment adviser, with employees being the overwhelming majority owners of the business.

The Troutman Pepper Locke team advising Bogart Wealth was led by partner [Mark Wilhelm](#) and included attorneys [Reid Oetting](#), [Mike Byrne](#), [Howard Goldberg](#), and [Mike Crumbock](#), along with paralegal [Dawn Hall](#). This transaction reinforces Troutman Pepper Locke's reputation as a go-to law firm for transactions involving RIAs and wealth management firms. The firm has extensive experience navigating the intricacies particular to asset management mergers and acquisitions and investment transactions.

Consistently recognized as a top-tier national practice, Troutman Pepper Locke's corporate attorneys regularly handle middle and lower middle market transactions for private equity clients alongside strategic deals for *Fortune* 100 corporations. Core areas of service include mergers and acquisitions, corporate finance, corporate governance, securities laws compliance, capital markets transactions, and other significant domestic and cross-border transactions, as well as general corporate counseling. The firm has a strong focus in the private equity and private fund services space, advising clients on matters including fund formation, growth equity investments, leveraged buyouts, recapitalizations, and exit transactions.

Troutman Pepper Locke

Troutman Pepper Locke helps clients solve complex legal challenges and achieve their business goals in an ever-changing global economy. With more than 1,600 attorneys in 30+ offices, the firm serves clients in all major industry sectors, with particular depth in energy, financial services, health care and life sciences, insurance and

reinsurance, private equity, and real estate. Learn more at troutman.com.

RELATED INDUSTRIES + PRACTICES

- [Corporate](#)
- [Mergers + Acquisitions](#)
- [Private Equity](#)
- [Tax](#)