



**NEWS RELEASE**  
**CHICAGO, Dec. 12, 2022**

**CHOREO TO PARTNER WITH GREERWALKER LLP  
AND ACQUIRE GREERWALKER WEALTH LLC**

***Southeast-Based Wealth Management Business with Approximately \$275 Million in  
Assets Further Expands Firm's Footprint***

***GreerWalker LLP and Choreo to Enter Into Ongoing Strategic Partnership***

**CHICAGO (Dec. 12, 2022)** — [Choreo, LLC](#) (Choreo) today announced it has entered into an agreement to acquire [GreerWalker Wealth LLC](#), an entity affiliated with GreerWalker LLP. In addition to the acquisition, Choreo and GreerWalker LLP will enter into a strategic partnership to further accelerate the growth of their respective businesses.

With approximately \$275 million in assets under management, GreerWalker Wealth LLC represents a second expansion of Choreo's footprint in the Southeast and increases the firm's total assets under management and advisement to approximately \$14.8 billion<sup>1</sup>. The transaction is expected to close in the first quarter of 2023, pending satisfaction of customary conditions. Terms of the transaction were not disclosed.

"Partnering with GreerWalker is a special opportunity," said [Larry Miles](#), CEO of Choreo. "Our firms have a strong philosophical alignment, shared CPA heritage and a complementary vision for future growth."

[John Norman](#), Managing Partner GreerWalker LLP, added, "GreerWalker Wealth is thrilled to join Choreo and to expand access to technology and operations expertise that will help grow our business. We look forward to our ongoing strategic partnership with Choreo and to creating new opportunities for our wealth professionals and their clients."

Choreo is dedicated to ensuring a smooth transition for GreerWalker Wealth's management team and clients. Clients will continue working with the professionals they know and trust, receiving the same financial planning and wealth management services.

This announcement represents the third acquisition by Choreo since Parthenon Capital, together with Choreo management and advisors, purchased the company from one of the largest CPA and professional services firms in the country in February of 2022.

<sup>1</sup> Approximate post-close number; also includes assets related to [two other previously announced acquisitions](#) of Enso Wealth Management and Cherry Bekaert Wealth Management expected to add \$2.8 billion in assets under management upon closing of those transactions. As of April 30, 2022, \$11.8B constitutes Choreo's regulatory assets under management or

advisement. As of September 30, 2022, GreerWalker Wealth LLC managed approximately \$275M of assets.

### **About Choreo, LLC**

Choreo is an independent firm focused on redefining the RIA's place in the wealth advisory industry. Passionate about improving the well-being of clients, their families and their communities, Choreo operates out of 28 locations across the country. Choreo's experienced advisors define, design and build solutions for their clients' financial and related needs so they can focus on what matters most to them. Originally launched over 20 years ago as a subsidiary of one of the largest CPA and professional services firms in the country, Choreo serves over 3,600 families with approximately \$11.8 billion of assets under management or advisement (as of April 2022). For more information, visit [choreoadvisors.com](http://choreoadvisors.com).

Choreo, LLC is a limited liability company that provides investment advisory services, financial planning, and other wealth management services to individuals and businesses. Choreo, LLC is an SEC-registered investment adviser. Registration as an investment adviser does not imply any skillset of the wealth manager and/or its advisors.

### **About GreerWalker LLP**

GreerWalker LLP provides tax, accounting, and advisory services focused on the needs of privately held middle-market companies and their owners throughout the US and around the globe. Through their affiliate, GreerWalker Wealth LLC, an SEC-registered investment advisor, they offer customized wealth planning for every stage of life. Their affiliate GreerWalker Corporate Finance LLC offers exit planning and merger and acquisition services to complete the business life cycle. With over 120 associates, they are one of the ten largest CPA firms in their region and among the top 200 CPA firms in the United States. They have repeatedly been recognized as one of the nation's "Best of the Best" accounting firms by Inside Public Accounting based on their overall superior financial and operational performance. For more information, visit [GreerWalker.com](http://GreerWalker.com).

### **About GreerWalker Wealth LLC**

GreerWalker Wealth LLC is registered as an investment adviser. As of September 30, 2022, the Firm served high net worth individuals and retirement plans with approximately \$275 million under management or advisement. GreerWalker Wealth LLC offers to its clients (individuals, high net-worth individuals, pension and profit-sharing plans, charitable organizations, etc.) portfolio management services, financial planning services, financial consulting services, and retirement plan services. For more information, visit [GreerWalker.com](http://GreerWalker.com).

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### **Media inquiries**

Joseph Kuo / Michael Dugan  
Haven Tower Group  
424 317 4851 or 424 317 4852  
[jkuo@haventower.com](mailto:jkuo@haventower.com) or [mdugan@haventower.com](mailto:mdugan@haventower.com)