



## CHOREO COMPLETES ACQUISITION OF ENSO WEALTH MANAGEMENT

### *Deal Quickly Follows Completion of Acquisition of Cherry Bekaert Wealth Management*

**CHICAGO – Jan. 4, 2023** – Choreo, LLC (“Choreo” or “the firm”) today completed the [previously announced](#) acquisition of Enso Wealth Management (“Enso”) a Petaluma, California-based firm with approximately \$1.8 billion in assets under management serving over 1,900 families.

The deal – Choreo’s second acquisition since launching as a standalone organization last year – enhances its presence in Northern California and Nevada, and increases the firm’s assets under management or advisement to approximately \$14.5 billion. On January 3, Choreo also announced the completion of the acquisition of Cherry Bekaert Wealth Management, which added approximately \$1 billion in assets under management and advisement.

“The acquisition of Enso greatly strengthens our ability to provide clients with a wide array of planning and advisory services,” said Larry Miles, Choreo's CEO. “In addition, Enso’s commitment to translating wealth into fulfillment for clients, while creating a supportive environment for enterprising financial advisors, fits perfectly with the culture we have developed at Choreo.”

Enso’s 13 advisors and nine support staff now work under the Choreo brand as Jim DeCota, Enso’s co-founder and President, assumes the role of Managing Director. The team will continue to provide individualized investment advice to clients through its Comprehensive Portfolio Management service, as well as provide general investment advice through its Financial Planning & Consulting and Pension Consulting services.

“We are thrilled to become part of Choreo,” said Mr. DeCota. “Larry and his team have built the infrastructure and support tools to allow our advisors to flex their entrepreneurial muscles and pursue innovative ways to help our clients plan for the future and reach the important financial milestones in their lives.”

Parthenon Capital, Choreo management and its advisors purchased the company from one of the largest CPA and professional services firms in the country in February of 2022. Besides Enso Wealth Management and Cherry Bekaert Wealth Management, Choreo also announced an agreement late last year to acquire GreerWalker Wealth LLC.

Terms of the transaction were not disclosed. Turkey Hill Management and Faegre Drinker served as financial advisor and legal counsel, respectively, to Enso. Vedder Price served as legal counsel to Choreo.

### **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. 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](https://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.

#### 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)