

# Mercer Advisors AUM Tops \$15 Billion with Latest Acquisition

Mercer Global Advisors Inc., a national registered investment advisor, has acquired Confluence Financial Advisors LLC, a comprehensive wealth management firm located in Boulder, Colorado with assets under management of approximately \$240 million. The acquisition increases Mercer Advisors' AUM to more than \$15 billion.

Confluence was founded in 2015 by David Gardner and Judy McNary and provides comprehensive wealth management services to high net worth clients. Gardner, McNary, and their five team members will be joining Mercer.

"Confluence and Mercer Advisors are a perfect cultural fit, we share the same values, we've both anchored our businesses on delivering robust financial planning to our clients, and we believe the only interests to consider are the best interests of the client. This is the bedrock for a successful combination," said Dave Barton, Mercer's vice chairman who leads merger and acquisition activity.

Established in 1985, Mercer Advisors is a wealth management firm that provides comprehensive, fee-only investment management, financial planning, family office services, retirement benefits and distribution planning, estate and tax planning, asset protection expertise, and corporate trustee and trust administration services. Headquartered in Denver, Mercer Advisors is privately held and has more than 350 employees with locations across the country.

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