



Dynasty Served as Exclusive Financial Advisor to Alpha Capital Dallas on Its Minority Equity Investment From Concurrent Investment Advisors

January 2026



Served as Exclusive Financial Advisor to



On its acquisition of



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Dynasty Investment Bank Acted as Exclusive Financial Advisor to Alpha Capital Dallas

Transaction Details

- On January 8, 2026, Concurrent Investment Advisors (“Concurrent”), a multi-custodial, hybrid registered investment adviser, announced it has completed a minority investment in Capital Ideas and Bearing Financial Advisors, together operating under holding company Alpha Capital Dallas (“Alpha”)
- Transaction was finalized in late 2025
- This transaction exemplifies Concurrent’s focus on partnering with entrepreneurial advisors seeking scale without sacrificing independence
- Also reinforces a shared commitment to offering Alpha Capital Dallas an evolution that builds on their success while respecting autonomy and reinforcing Alpha’s priority of continuously improving client experience

Overview of Alpha Capital Dallas

- Founded in 1984 and headquartered in Dallas, TX, Capital Ideas built its reputation by dedicating their Firm’s culture and process to serve their clients. With experience spanning across major market cycles of the past 40 years, they guide their strategic approach to portfolio management and risk assessment
- Founded in 2002 and headquartered in Austin, TX, Bearing Financial Advisors has applied a “team-approach” to address client financial planning needs. They consult with clients to visualize goals and implement action plans to individually tailor portfolios
- Both practices, operating under the Alpha Capital Dallas holding company, have a combined \$400 million in AUM. Partners of the company, Andrew Kerai, James Jacobson, and Karen Burns, bring institutional investment experience with a focus on continuity and client outcomes

Overview of Concurrent Investment Advisors

- Established in 2017, Concurrent is one of the largest and fastest-growing RIA platforms in the country, focused on providing client solutions, curated resources, and technology that empower advisors to best serve their clients
- Combines strategic advisory expertise with a collaborative minority-equity partnership model empowering advisory teams to grow faster, operate more efficiently, and build enduring enterprises
- Concurrent operates with a philosophy of growth and independence, partnering with firms that share its vision for long-term growth and client-first values. Following the launch of Capital Partners program late last June, it has invested in five firms across multiple markets, including Texas and Washington

Strategic Rationale

Entrepreneurial Platform Model

Concurrent’s growth-oriented approach and comprehensive consulting support align with the partners vision to enhance offerings without compromising autonomy

Enchanted Client Experience

The partnership enables access to technology, investments, and operational support on an a la carte basis while maintaining independence through separate ADVs

Cultural and Philosophical Alignment

Both firms share a client first focus, comprehensive view of family wealth planning, fiduciary integrity, and dedication to long-term relationship building



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