



**Dynasty Investment Bank Served as Exclusive
Financial Advisor to Cyndeo Wealth Partners
on Its Minority Equity Investment From
Rise Growth Partners**

March 2026



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Served as Exclusive Financial Advisor to



Announced a Minority Equity Investment From



March 2026

Transaction Details

- On March 11, 2026, Rise Growth Partners (“Rise”) announced a strategic minority equity investment in Cyndeo Wealth Partners (“Cyndeo”), an independent RIA headquartered in Saint Petersburg, Florida, with approximately \$3.1 billion in AUM
- Cyndeo selected Rise following a competitive evaluation process for its exclusive focus on wealth management and the team’s decades-long experience building, scaling, and operating advisory businesses

Overview of Cyndeo

- Founded in 2020 by industry veterans to give advisors a stronger voice in their future while maintaining high performance standards and a client-first culture
- Focused on serving high-performance individuals and families with complex financial needs, including entrepreneurs, executives, and professional athletes across Florida and the Southeast
- Built a reputation for disciplined organic growth, a relationship-driven service model, and a strong focus on long-term planning for clients navigating major life transitions

Overview of Rise

- Industry-focused growth partner founded in 2023 to provide minority equity capital paired with hands-on strategic and operational expertise supporting long-term, advisor-led growth
- Comprises experienced operators who have built, scaled, and exited successful firms, working side-by-side with leadership teams to drive results while preserving independence
- Represents the firm’s fourth RIA investment, alongside OnePoint BFG Wealth Partners, Grimes & Company, and Krilogy

Executive Commentary



“From day one, Cyndeo has been built around giving advisors a real voice in their future while holding ourselves to exceptionally high standards on behalf of our clients. Having come from a wirehouse environment myself, I know how hard it can be for advisors to find true independence without sacrificing growth or autonomy. Rise understands that balance. The Dynasty investment banking team did a great job helping us find the right partner in Rise. This partnership will allow us to continue to scale intentionally while continuing to deliver the breadth and depth of services necessary to compete in today’s environment.”

- Matt Kilgroe, President & CEO at Cyndeo



“We treat this like a team, because teams want to win. Cyndeo has built a performance-driven culture with clear expectations, accountability and support, which makes them exactly the kind of firm we look to partner with. We’re proud to partner with Dynasty to accelerate this next phase of growth. Together, this positions us to be truly ambitious, particularly in lifting high-performance advisors out of the wirehouse environment and giving them independence without sacrificing scale or support.”

- Joe Duran, Managing Partner at Rise



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