



**Dynasty Investment Bank Serves As Exclusive
Financial Advisor to Jazz Wealth Managers
on Its Sale to Steward Partners**

May 2026



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Transaction Details

- On May 5, 2026, Steward Partners (“Steward”), an employee-owned independent financial services firm specializing in comprehensive wealth management solutions, announced the acquisition of Jazz Wealth Managers (“Jazz”), adding approximately \$450 million in client assets to its M&A Channel platform
- The transaction aligns Jazz’s mission to deliver scalable, technology-driven wealth management services to investors of all sizes with Steward’s differentiated platform, combining operational scale, advanced technology, and flexible affiliation models to support advisor growth and efficiency
- The acquisition reflects broader industry dynamics, as advisors increasingly seek optionality, institutional support, and a clear path to scale their businesses, partnering with platforms that offer structure, long-term stability, and growth enablement

Overview of Jazz

- Founder led since 2016; Jazz Wealth Managers is an independent RIA based in the Tampa Bay Area with a technology driven service offering dedicated to providing wealth management services to investors of all sizes
- As part of its unique value proposition, Jazz offers clients direct access to financial planning, account performance and savings tracking tools
- Jazz maintains a strong digital education platform, highlighted by a YouTube channel with over 36 million views, enhancing brand visibility and driving client acquisition

Overview of Steward

- Steward Partners is a full-service, employee-owned, independent financial services firm offering wealth management solutions for families, businesses, and multigenerational investors
- Since established in 2013, Steward has been recognized as one of the industry’s fastest-growing RIA firm, with 301 advisors and over 81 offices as of January 2026
- Steward oversees nearly \$50 billion in client assets across comprehensive wealth planning, private banking, institutional consulting, and business solutions services²

1.) All publicly announced transactions involving the acquisition of an independent advisory firm were reviewed for inclusion, along with deals in which Dynasty invested through one of its capital programs. The ranking covers the period from January 1, 2025 through December 31, 2025, and excludes banks transacting on deals over \$200bn in seller AUM. 2.) As of March 2026

Executive Commentary



“When we evaluated this move, we started with one rule: whatever we do has to benefit the client first, and then the team. We found a partner in Steward with the back-end infrastructure and expertise that frees us up to do what we actually love – and to be even more present for our clients than we were before. And the fact that they’re letting us keep being the quirky, unconventional firm we’ve always been? That sealed it.”

– Dustin Tibbitts, Founder of Jazz Wealth Managers



“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.”

– Scott Danner, Chief Growth Officer at Steward Partners

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