



**Dynasty Investment Bank Served as
Financial Advisor DayMark Wealth Partners
on Its Minority Equity Investment From
Constellation Wealth Capital**

December 2025



Dynasty Financial Partners Acted as Financial Advisor to DayMark Wealth Partners



Transaction Details

- On December 15, 2025, DayMark Wealth Partners (“DayMark”), a rapidly growing RIA, announced that Constellation Wealth Capital (“CWC”), had acquired a minority stake in the firm
- The capital will support DayMark’s continued advisor recruiting, market expansion and technology infrastructure investments
- The investment reflects the increasing demand among high-growth RIAs for flexible, long-term capital solutions that support expansion while maintaining operational autonomy

Overview of DayMark

- Founded in 2022 and headquartered in Cincinnati, OH, DayMark is a highly regarded registered investment advisor serving high-net-worth individuals, families and business owners
- Since its launch, DayMark has grown from \$1.4 billion in AUM to more than \$4.5 billion, expanding into markets including Ohio, Illinois, Connecticut, Utah and Florida
- The firm has grown to a team of forty professionals, positioning itself as a premier destination for elite wirehouse breakaway teams and capable of pursuing inorganic growth through acquisitions

Overview of Constellation Wealth

- Founded in 2023, CWC is an alternative asset management platform exclusively focused on the wealth management sector, providing minority equity capital to support long-term growth
- Combines capital solutions with strategic advisory expertise, leveraging industry relationships to help partner firms scale operations, attract elite advisor teams and strengthen their competitive positioning
- Operates with a philosophy of alignment and independence, partnering only with firms that share its commitment to integrity-driven growth and client-first values, helping to achieve sustainable success in a rapidly evolving RIA landscape

Strategic Rationale

DayMark’s momentum and institutional-grade base align with CWC’s vision to scale independent RIAs and support long-term growth

The partnership provides access to the ultra-high-net-worth advisory market and positions the platform to attract elite breakaway talent in a high-growth

Both firms emphasize alignment and autonomy; preserving entrepreneurial culture while adding strategic oversight



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