



Signature Estate & Investment Advisors (SEIA) Expands National Footprint with Its Largest Planned Acquisition To Date of a Cleveland-Based RIA

Cedar Brook Group in Cleveland, Ohio has agreed to partner with SEIA for access to resources that allow continued support to best serve their clients.

LOS ANGELES, CA, April 30, 2024 – Signature Estate & Investment Advisors (SEIA), a leading independent registered investment advisor (RIA) providing comprehensive investment management, financial planning, and estate and tax planning, is announcing that it has entered into a definitive agreement to acquire Cedar Brook, a \$2 billion RIA based in Cleveland, Ohio. This acquisition is expected to close in June 2024, subject to the satisfaction of customary closing conditions. Once completed, this acquisition will bring SEIA's AUM to over \$22 billion with 155 employees and advisors across 20 offices. Cedar Brook will represent SEIA's first major expansion into the Midwest, and its largest transaction since partnering with Reverence Capital Partners in 2022.

Bill Glubiak, CEO of Cedar Brook, adds, "Joining forces with SEIA marks an exciting chapter for Cedar Brook. Our shared devotion to client-centric services and innovative wealth management solutions positions us to deliver additional value to our clients."

"This dynamic partnership embodies our core values and aligns with our strategic vision of holistic wealth management services nationwide on behalf of our clients and their legacies," says Brian Holmes, SEIA's CEO.

This partnership will strengthen SEIA's presence in Ohio, Pennsylvania, and Michigan. Cedar Brook's proficiency in financial planning complements the [recent appointment of April Rosenberry for](#) advanced trust and estate planning. Additionally, SEIA offers comprehensive wealth management services, including client model and custom portfolios, concierge-level service, access to alternative investments, and a new Broker Dealer, Signature Estate Securities.

"SEIA is positioning itself for strategic national growth opportunities" said Cameron Stagg, Director of M&A. "This is just the beginning of SEIA's M&A endeavors. We expect significant additional acquisitions across the nation."

Greenberg Traurig, LLP served as legal counsel to SEIA in connection with the transaction and Calfee, Halter & Griswold LLP and Ciano & Goldwasser, LLP served as legal to Cedar Brook.

About SEIA:

Signature Estate & Investment Advisors, LLC® (SEIA) is an investment advisory firm offering Investment Management and Financial Planning Services. We provide an advisory partnership focused on helping you achieve your long-term goals and objectives through an open

collaboration process. Our commitment to successful wealth management is built upon deeply-rooted and meaningful client relationships, a key driver in our 25 years of delivering client-centric wealth management solutions. SEIA has been backed by Reverence Capital, a NY-based private equity firm, since 2022.

About Cedar Brook Group:

Cedar Brook Group is an investment advisory firm headquartered in Cleveland, Ohio, with two additional locations in Michigan and Pennsylvania. We offer a comprehensive range of services, including financial planning, wealth management, retirement plans, employee benefits, insurance solutions, and risk assessment. Founded in 2005, Cedar Brook Group is dedicated to providing you with personalized and strategic financial guidance.

SEIA's reported Assets Under Management (AUM) represents the combined total of SEIA and its affiliated entities as of 3/31/2024. AUM includes portfolios continuously supervised or managed by SEIA and its affiliates. The AUM encompasses assets like stocks, bonds, ETFs, mutual funds, and cash, among others. The reported employee count as of 3/31/2024 encompasses full-time staff employed by SEIA and its affiliated entities. SEIA is not engaged in rendering legal, accounting, or tax services. We recommend that all investors seek out the services of competent professionals in any of the aforementioned areas. Signature Estate & Investment Advisors, LLC (SEIA) is an SEC-registered investment adviser; however, such registration does not imply a certain level of skill or training and no inference to the contrary should be made. Securities offered through **Signature Estate Securities, LLC**, member FINRA/SIPC. Investment advisory services offered through SEIA, 2121 Avenue of the Stars, Suite 1600, Los Angeles, CA 90067, (310) 712-2323.

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