IM DEALS

Allworth Acquires Sachetta and Arthur Stein Financial

AUGUST 24, 2026

Allworth Acquires Sachetta and Arthur Stein Financial

Allworth Financial ("Allworth") announced, on August 4, 2026, that it acquired both Sachetta and Arthur Stein Financial ("Arthur Stein"). Under the terms of the transaction, 21 professionals from Sachetta, including 13 wealth and tax advisors joined Allworth. Further terms of the transactions were not disclosed.

Allworth, based in Folsom, California, is a registered investment advisor offering investment management, financial planning, tax planning and preparation, insurance, 401(k) management and estate planning services. Allworth has approximately $39 billion in assets under management.

Sachetta, based in Lynnfield, Massachusetts, is a registered investment advisor and wealth management and tax advisory firm specializing in tax planning services. Sachetta oversees approximately $1.1 billion in assets under management. Houlihan Lokey served as advisor to Sachetta in the transaction.

Arthur Stein, based in Bethesda, Maryland, is a registered investment advisor specializing in financial planning for federal employees and retirees. As of March 23, 2026, Arthur Stein had approximately $141 million in assets under management.

To read the press release: please click here.