Allworth Financial Accelerates Growth Strategy with Acquisition of $1.1 Billion Tax-Focused Advisory Firm Sachetta

NEWS PROVIDED BY
Allworth Financial ⟶
Aug 04, 2026, 09:00 ET

The transaction strengthens Allworth's integrated wealth and tax platform while a second acquisition expands its East Coast footprint.

FOLSOM, Calif., Aug. 4, 2026 /PRNewswire/ -- **Allworth Financial**, an award-winning, full-service national RIA, today announced the acquisition of Sachetta, a Lynnfield, Massachusetts-based wealth management and tax advisory firm overseeing $1.1 billion in assets under management (AUM). The acquisition adds 21 professionals, including 13 wealth and tax advisors, and approximately 630 client households to Allworth, further strengthening the firm's presence in the Greater Boston area.

The deal adds a firm distinguished by its fully integrated wealth and tax advisory model, where tax planning serves are offered as a core component of every client relationship. The combination further strengthens Allworth's own commitment to offering coordinated financial planning, investment management, and tax services to clients while continuing to build its presence in one of the firm's key strategic growth markets.

Sachetta brings a next-generation leadership team with an established succession plan and specialized expertise working with business owners, a capability that strengthens Allworth's ability to serve this growing client segment across its national platform**.** Clients of Sachetta will gain access to Allworth's

broader platform, including expanded investment capabilities, advanced estate planning resources, access to private markets, dedicated client service and digital tools, and additional operational support, all while continuing to work with the advisors they know and trust.

"What stood out about Sachetta is that their entire firm is built around the idea that tax planning and wealth management can't be separated," said **John Bunch, Chief Executive Officer of Allworth Financial**. "That approach is a natural extension of what we've built at Allworth, and bringing our teams together strengthens both firms' ability to deliver truly integrated wealth and tax advice. The Sachetta team has built a next-generation leadership team with a proven track record of growing great advisors, and we're excited to welcome them and their clients to Allworth."

The deal is among the first acquisitions completed since **Allworth entered a new strategic investment partnership** co-led by Integrum Holdings, Lightyear Capital, and Ontario Teachers' Pension Plan, announced in April 2026. That partnership was structured to accelerate Allworth's organic growth plan, including expanding its national footprint through high-quality partnerships with firms that share its long-term commitment to clients, advisors, and employees.

"By joining Allworth, we can leverage the resources of a much larger firm while maintaining the client-first culture that defines who we are," said **Michael Callahan, Partner at Sachetta**. "With Allworth's resources, we will be able to grow far more quickly and efficiently without sacrificing what's made us special in the first place: our relationship with our clients."

Further strengthening its growing East Coast presence, Allworth also announced today the acquisition of Arthur Stein Financial, a Bethesda, Maryland-based RIA specializing in comprehensive financial planning for federal employees and retirees. The transaction extends Allworth's presence in the Mid-Atlantic region and adds a niche planning practice with a deep, established client base to the firm's national platform.

"What drew me to Allworth is how closely their values align with ours," said **Arthur Stein, Founder of Arthur Stein Financial**. "Like us, Allworth is a fiduciary that puts clients first and delivers personalized, comprehensive advice. The addition of in-house CPAs and attorneys for tax and estate planning means we can now offer clients a truly coordinated approach where every financial decision is evaluated in the context of their full financial picture."

Together, the Sachetta and Arthur Stein acquisitions demonstrate the early execution of Allworth's growth strategy following its new strategic investment partnership. Both transactions underscore the firm's focus on partnering with advisory practices that share its fiduciary values, client-first culture, and long-term commitment to disciplined, intentional expansion.

Sachetta was represented by Houlihan Lokey, a leading global investment bank with expertise in mergers and acquisitions.

Advisors and firms seeking to join Allworth's national platform can find partnership details at allworthfinancial.com/partnerwithus.

About Allworth Financial

Founded in 1993 and headquartered in Folsom, California, Allworth Financial is a national, full-service registered investment advisory firm with approximately $39 billion in assets under management and administration. Serving clients in all 50 states through more than 40 offices nationwide, Allworth delivers integrated financial planning services, including investment management, tax planning and preparation, estate planning, insurance, and 401(k) management. Backed by Integrum Holdings, Lightyear Capital, and Ontario Teachers' Pension Plan, the firm has completed more than 45 acquisitions since 2018. Consistently recognized as a top 20 RIA by Barron's, Allworth delivers personalized financial guidance, supported by experienced professionals and an industry-leading platform, to help clients plan wisely and enjoy life. For more information, visit: AllworthFinancial.com.

SOURCE Allworth Financial

21%

more press release views with

Amplify™

Request a Demo