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# AlphaCore Wealth Advisory Strengthens Northeast Presence With Addition of Brave Family Advisors

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*Momentum continues with the addition of eight professionals, expanding AlphaCore's presence in the Northeast, a key strategic growth area for the firm*

LA JOLLA, Calif.--(BUSINESS WIRE)--AlphaCore Wealth Advisory ("AlphaCore"), a leading independent wealth advisory firm, announced today the addition of Brave Family Advisors ("Brave"), a boutique wealth practice overseeing $700 million in client assets. The transaction strengthens AlphaCore's presence in the Northeast, expanding the firm's reach in a strategically important wealth management market and advancing its long-term growth strategy.

Founded in 1992, Brave has served high-net-worth and ultra-high-net-worth households for more than three decades through a comprehensive, personalized family office approach, building a strong reputation for helping clients navigate financial complexity. Led by Founder Brett Haire and President Scott Morrison, Brave joins AlphaCore with a team of eight professionals, including four advisors. The partnership reflects a multi-year relationship built on trust, cultural alignment, and a shared commitment to client service. The transaction adds experienced talent, infrastructure, and enhanced service capabilities that will support the firm's continued growth in Summit, New Jersey and Tiverton, Rhode Island.

"We are intentional about who we partner with and where we invest," said Dick Pfister, Founder and CEO of AlphaCore Wealth Advisory. "Brave Family Advisors represents a foundational investment in our long-term strategy for expansion in the

New York area and marks the opening of our Summit, NJ office. We believe the market presents a significant opportunity for growth over the coming years."

Beyond its regional presence, Brave stood out for its tenured advisory team, deep client relationships and shared commitment to providing a high-touch, boutique experience, closely aligning with AlphaCore's client-first philosophy. Pfister added, "Brett, Scott, and their team have built an exceptional business serving the types of clients we know best, and their addition elevates both our advisory talent and planning capabilities."

Brave clients will gain access to AlphaCore's expanded capabilities, including in-house tax strategy and preparation, trust and estate coordination, philanthropic planning, family governance, and a specialized investment research team with deep private markets expertise. Through AlphaCore Family Office Services, clients also have access to integrated solutions designed to address the complex financial, operational, and legacy planning needs of high-net-worth and ultra-high-net-worth families. Together, these resources allow advisors to provide more comprehensive support while maintaining the personalized relationships that have long defined both firms.

"From our earliest conversations, it was clear that AlphaCore shared our philosophy on both clients and culture," said Morrison and Haire of Brave. "Our team has always focused on building strong relationships and helping families navigate the opportunities and challenges that come with wealth. AlphaCore's commitment to clients, collaborative culture, and deep bench of resources made it the right fit for our team and the families we serve."

Turkey Hill Management served as the financial advisor and Troutman Pepper Locke served as legal counsel to Brave. Sheppard, Mullin, Richter & Hampton served as legal counsel to AlphaCore.

**About AlphaCore Wealth Advisory**

AlphaCore Wealth Advisory is an independent wealth advisory firm dedicated to helping clients build, preserve, and protect their wealth. Headquartered in La Jolla, California, with offices nationwide, AlphaCore takes a comprehensive approach to wealth planning and strives to deliver sophisticated investment management services by providing access to both traditional and alternative investments. Supported by in-house research, operational resources, and modern technology, AlphaCore advisors place clients' goals at the center of every financial plan.

Learn more at www.alphacore.com

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**Industry:** Consulting Professional Services Finance

ALPHACORE WEALTH ADVISORY

### RELEASE SUMMARY

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