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Greycourt Completes Ownership Succession Plan, Bolstering Independence And Client Alignment

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PITTSBURGH, Pa. – Greycourt LLC, one of the nation's leading investment advisors to ultra-high net worth clients, today announced it has completed a management-led transition of the firm's ownership, cementing its long-held culture of independence, creativity, and expertise.

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Greycourt was founded in 1988 by Greg Curtis and has grown into one of the country's premier independent advisory firms, serving ultra-high net worth families and their family offices from offices in Pittsburgh, Pennsylvania, Portland, Oregon, Nashville, Tennessee, and San Antonio, Texas.

"From the beginning, Greycourt was built to be independent, client-centered, and enduring. We believe this transaction is a coherent way to allow our core principles to continue well beyond the working life of any one individual," said Matt Litwin, CEO of Greycourt.

Greycourt's President David Wells added, "As the trusted investment adviser to many of the nation's wealthiest families, our clients look to Greycourt for objective and unbiased advice that will serve their long-term best interests. Our transaction aligns Greycourt as closely as possible with the unique needs and high expectations of our clients."

Many other firms have addressed generational transition via sales to, or partnerships with, asset managers, private equity investors, or other corporate parents. "Our approach is intentionally different and means our success is tied directly to the quality of the advice we deliver, not to monetizing our client relationships for the benefit of any external or passive owner," said Matt Litwin, Greycourt's Chief Executive Officer.

About Greycourt

Founded in 1988, Greycourt LLC is one of the premier independent investment advisory firms in the United States,

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