News

Hightower Announces $275M Acquisition of Valley Financial Group

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PRESS RELEASE

CHICAGO — August 11, 2026 — Hightower Advisors ("Hightower") today announced that Valley Financial Group ("Valley"), an independent wealth management practice based in Ambler, Pennsylvania, will join Hightower Signature Wealth ("HTSW"), Hightower's fully integrated national wealth management practice.

The transaction marks the second external acquisition into HTSW this year and advances Hightower's strategy of expanding the practice with established advisory practices seeking greater scale, centralized capabilities and long-term growth.

Valley oversees approximately $275 million* in assets under management and provides comprehensive financial planning and investment management services to individuals, families and businesses.

"Valley has built a trusted advisory practice grounded in deep client relationships, thoughtful advice and a strong commitment to its community," said Larry Restieri, Chief Executive Officer of Hightower. "Welcoming Valley to HTSW further demonstrates the appeal of our integrated practice to established firms looking to accelerate growth, enhance the client experience and create longevity for their teams."

HTSW provides integrated capabilities across investment management, financial planning, operations, technology, compliance, marketing and client service, allowing advisors to spend more time serving clients and growing their businesses.

"As we considered Valley's next chapter, we wanted a partner that shared our client-first philosophy and could provide the resources to continue elevating the service we provide our clients," said Kevin McGarry, Managing Partner of Valley Financial Group. "HTSW gives us greater scale and expanded capabilities while preserving the personal relationships that have always been

at the heart of our firm."

Valley serves clients throughout Greater Philadelphia, including individuals and families, business owners, corporate employees and first responders. The firm is also actively involved in nonprofit and civic organizations across the region.

"Joining HTSW will strengthen the tools available to our team and expand how we serve clients across generations," said Ed Woehlcke, CFP®, Managing Partner of Valley Financial Group. "We're proud to become part of an organization that shares our commitment to sustained relationships, collaboration and personalized financial advice."

Upon closing, Valley's employees will become part of HTSW and continue supporting clients from the practice's Ambler office. Following the addition, HTSW will have approximately $40 billion in assets under management*, more than 160 advisors and more than 35 locations nationwide. Hightower expects to announce additional HTSW acquisitions through the end of the year.

The transaction is expected to close later this summer.

*As of 6.30.26

About Hightower
Hightower is a wealth management firm that provides investment, financial and retirement planning services to individuals, families and institutions, as well as 401(k) consulting and cash management services to corporations. Through its community of advisor businesses, Hightower offers sophisticated planning solutions and a robust platform designed to help clients achieve their financial goals.

Headquartered in Chicago with offices nationwide, Hightower serves as a growth partner to independent-minded advisors seeking to scale their practices, elevate the client experience and access the benefits of a national brand. Learn more about Hightower's collaborative business model at www.hightoweradvisors.com.

Hightower Advisors, LLC is an SEC-registered investment adviser. Registration as an investment adviser does not imply a certain level of skill or training. Securities are offered through Hightower Securities, LLC, Member FINRA/SIPC.

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Form Client Relationship Summary ("Form CRS") is a brief summary of the brokerage and advisor services we offer.
HTA Client Relationship Summary
HTS Client Relationship Summary

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