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MERCER ADVISORS

Mercer Advisors Expands Ohio Valley Presence with NorthAvenue Financial Advocates

AUGUST 25, 2026

Ohio-based planning firm strengthens regional footprint, Women & Wealth practice

DENVER, August 25, 2026 – Mercer Global Advisors, Inc. ("Mercer Advisors"), a national Registered Investment Adviser ("RIA"), today announced the acquisition of NorthAvenue Financial Advocates ("NorthAvenue"), a Columbus, Ohio-based wealth management firm with more than $220 million in assets under management (as of 2/28/26).

For over seven years, NorthAvenue has provided comprehensive wealth planning and implementation services, including investment management and tax planning and preparation. The firm is known for delivering a highly personalized client experience and building long-term relationships through referrals, community involvement and trusted professional networks.

"NorthAvenue was built on the belief that financial planning should be collaborative and centered on helping clients achieve their goals," said **Kristen Moosmiller, Founder and Senior Advisor of NorthAvenue Financial Advocates**. "As we looked to the future, we sought a partner that could expand the resources available to our clients while preserving the personalized relationships and boutique experience that defines us. Mercer Advisors stood out for its planning-first culture, specialized expertise and ability to help firms grow without losing the local identity that makes

NorthAvenue further strengthens Mercer Advisors' presence across the Ohio Valley, one of the firm's fastest-growing regions. Since 2019, Mercer Advisors has grown its Ohio Valley business from approximately $100 million in client assets to more than $2.2 billion today. The firm's Ohio Valley footprint includes offices in Cincinnati and Westerville, Ohio; Indianapolis, Indiana; Pittsburgh, Pennsylvania; and Lexington and Louisville, Kentucky.

"NorthAvenue brings a talented team, a strong planning discipline and a reputation for delivering exceptional client service," said **Chip Workman, Managing Partner and market leader for Ohio Valley and Tennessee at Mercer Advisors.** "Their addition deepens our presence across the Ohio Valley while further expanding our ability to deliver integrated family office services. Together, we're combining the advantages of a national platform with the local relationships and expertise clients value most."

The partnership also expands Mercer Advisors' Women & Wealth practice through the addition of NorthAvenue's predominantly women-led team. This further enhances Mercer Advisors' ability to serve women investors with specialized capabilities across tax, estate, insurance, trust and investment management.

"As a predominantly women-led team, we've seen firsthand the value of building relationships and planning experiences that resonate with women," said Moosmiller. "Joining Mercer Advisors allows us to expand that impact by pairing our approach with deeper resources and specialized capabilities for women investors."

"NorthAvenue is exactly the kind of firm we seek to partner with: client-centered and deeply rooted in its community," said **Ted Motheral, Executive Managing Partner, M&A Partner Development at Mercer Advisors**. "Firm leaders increasingly want the freedom to focus on clients rather than operational complexity. Mercer Advisors provides the scale, infrastructure and specialized support teams that help advisors expand their impact, while preserving the relationships, culture and local identity that made their firms successful in the first place."

For more information about partnering with Mercer Advisors, please visit Partner With Us.

About Mercer Advisors

Mercer Global Advisors, Inc. was named the #1 ranked RIA firm in the nation for two years in a row according to Barron's 2025 and 2024 Top 100 Registered Investment Advisor Firms. Founded in 1985, Mercer Advisors has been trusted to help families amplify and simplify their financial lives. The company offers comprehensive, fee-based family office services, including financial planning, estate and tax planning, insurance solutions, and corporate trustee and trust administration services. Mercer Advisors is majority owned by Oak Hill Capital, Genstar Capital, and Altas Partners. Mercer Global Advisors Inc. is headquartered in Denver, Colorado, is privately held, has over 1,700 employees, and operates nationally through more than 120 locations. Mercer Advisors has $111 billion in client assets. For more information, visit merceradvisors.com and

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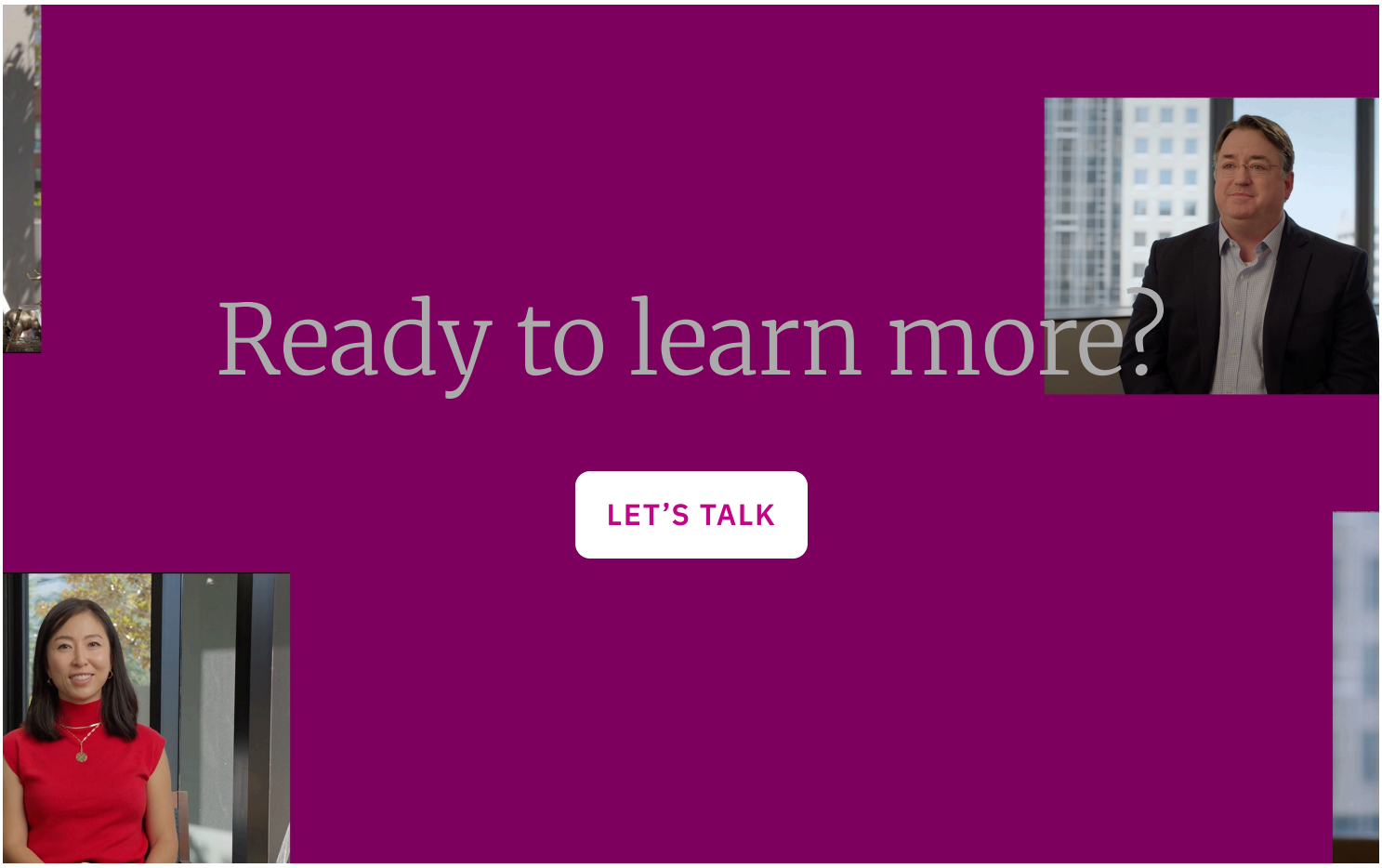
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