Merit Financial Advisors Acquires $900 Million firm, The Bridgeway Group, Expanding Southern California Presence

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Merit Financial Advisors →
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ATLANTA, Aug. 12, 2026 /PRNewswire/ -- Merit Financial Advisors ("Merit"), a Georgia-based financial advisory firm specializing in financial planning and wealth management solutions for high-net-worth individuals and families and those navigating life transitions, today announced the acquisition of The Bridgeway Group ("Bridgeway"), a Southern California-based wealth management firm with offices in Pasadena and Covina.

Bridgeway oversees approximately $900 million in total assets and is led by longtime partners Matt Dupon, Sean Montgomery and Scott Miller. The nine-person team provides comprehensive financial planning and investment management, with a particular focus on retirement planning.

This marks Merit's 61st acquisition and ninth partnership in 2026, continuing the firm's national expansion strategy of partnering with high-quality, growth-focused firms and teams. Bridgeway is also the sixth team formerly affiliated with Commonwealth Financial Network to join Merit since the announcement of Commonwealth's acquisition by LPL Financial last year.

David Wahlen, Executive Vice President/Strategic Partners of Merit Financial Advisors, said Bridgeway represents an important addition to Merit's growing West Coast presence and reflects the type of next-generation, growth-oriented leadership Merit is seeking as it expands.

"Bridgeway brings together many of the qualities we look for in a partner: a deeply client-centric culture, a strong financial planning orientation, an experienced multi-generational team and a genuine desire to continue growing," said Wahlen. "Matt, Sean and Scott are entrepreneurial partners who want to invest in the future of their business and in Merit. Combined with the addition of Pradel Financial Group in the Seattle area earlier this year, Bridgeway gives us another outstanding team and further strengthens our growing presence on the West Coast."

All Bridgeway employees will join Merit. Dupon and Montgomery will serve as Wealth Manager, Partner, while Miller will become Area Director, Wealth Manager, Partner.

Bridgeway had spent the past 13 years affiliated with Commonwealth Financial Network and had grown approximately 22% annually over the past five years through a combination of market appreciation, acquisition and organic growth. Commonwealth's acquisition created a natural opportunity for the partners to evaluate what they wanted the firm's next chapter to look like.

"We knew we were going to make a transition, so it made sense to step back and ask where we wanted to go from here," said Dupon. "We have built a strong business and want to keep growing, but continuing at this pace requires greater infrastructure and support. Merit gives us that support while allowing us to maintain the independence that has always been extremely important to us."

Bridgeway has historically generated organic growth primarily through referrals from clients and centers of influence, including attorneys and CPAs. The partners see an opportunity to build on that foundation through Merit's marketing, technology, operational and growth resources while spending less time on administrative responsibilities.

"So much of owning a growing firm becomes HR, insurance, marketing, operations and other responsibilities that have little to do with why we entered this profession," Dupon added. "If we can spend more time serving clients and doing the work we enjoy, and less time on the things that pull us away from that, we believe it makes us a better firm and gives us greater capacity to grow."

Culture was equally important in Bridgeway's decision. Dupon said the accessibility of Merit's leadership and the fact that many senior leaders have themselves worked as financial advisors stood out during the evaluation process.

"There is a difference when the people leading an organization have actually sat across the table from clients and understand an advisor's day-to-day responsibilities," Dupon said. "We felt that from Merit's leadership. There was an understanding of what matters to advisors and a culture where everyone seems to be rowing in the same direction."

Bridgeway's partners also spoke with advisors they knew and respected who had previously moved from Commonwealth to Merit, reinforcing their view that Merit could offer the personal service and community they valued while providing broader resources.

"We had an incredibly positive experience at Commonwealth for many years, so our standard for what came next was very high," said Montgomery. "What I liked about Merit was the service, the people, the accessibility and the feeling that you are part of a community rather than simply a number in a much larger organization. Those qualities mattered a great deal to us."

The partnership also creates new opportunities for Bridgeway's next generation. Miller, 34, will assume the additional role of Area Director and expects to focus heavily on growth and talent development. Bridgeway recently added two associate-level planning professionals, increasing its capacity to serve clients and develop future advisors.

"For me, one of the most exciting parts of joining Merit is what it can mean for the next generation of our business," said Miller. "We have always operated much like a family business, where clients can reach the people they know and trust. Merit has that same accessibility while giving us a much broader set of growth, marketing and career-development opportunities."

Merit sees Bridgeway as an important platform for continued expansion throughout Southern California.

"This is already a highly successful firm with significant momentum," said Tait Lane, Managing Principal, Partner. "They are not looking for someone to change the business. They are looking for a partner that can help remove constraints around a great business and give a talented team more capacity to grow. That is where we believe Merit can add tremendous value."

The Bridgeway Group rebranded as Merit Financial Advisors upon the closing of the transaction on July 31, 2026. Financial and legal terms of the deal were not disclosed.

About Merit Financial Advisors

Merit Financial Group, LLC, doing business as Merit Financial Advisors ("Merit"), is a national wealth management firm that supports both the independent broker-dealer and RIA models. Merit exists to enrich the lives of those they serve, and its mission is to revolutionize the client experience by building the wealth management firm of the future. Based in Atlanta, Georgia, Merit has over 55 offices throughout the U.S. and manages approximately $30.1 billion in assets as of July 20, 2026, including $22.982 billion in advisory assets, $3.32 billion in brokerage assets, $2.65 billion in employer plans, and $1.8 billion in ESOP assets. For more information, please visit **www.meritfinancialadvisors.com**. Investment advice offered through Merit Financial Group, LLC, an SEC-registered investment adviser.

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