Merit Financial Advisors Partners with Bell Financial, Adding Second Office in Michigan

August 24, 2026

ATLANTA, GA – August 25, 2026 – **Merit Financial Advisors (https://www.meritfinancialadvisors.com/)** ("Merit"), a Georgia-based financial advisory firm that specializes in financial planning and wealth management solutions for high-net-worth individuals and families as well as those navigating life transitions, announced today that it has acquired Bell Financial Services Company ("Bell Financial"), a Marquette, Michigan-based wealth management firm, adding approximately $195 million in total assets.

The partnership expands Merit's presence in Michigan, where Bell Financial joins as Merit's second office in the state and the first on the Upper Peninsula. Bell Financial aligns closely with Merit's client-first culture and planning-focused approach, also adds an established advisory team with deep client relationships and a reputation for personalized service in an attractive market. By joining Merit, Bell Financial will be able to accelerate its next phase of growth through the firm's operational expertise, technological resources, and broad offering of client solutions. Merit gains a thriving practice known for strong client relationships and comprehensive financial guidance, including tax planning, retirement strategies, estate planning, risk management, and business financial services, as well as employer retirement plan consulting.

Bell Financial joins Merit from Commonwealth Financial Network. Kris Maksimovich, another former Commonwealth advisor who joined Merit in 2025, helped connect the firms. Jesse Bell, President and Owner of Bell Financial, will join Merit as a Wealth Manager

and Partner, along with members of his team.

"Along with Kris' recommendation, we also heard ringing endorsements from multiple former Commonwealth advisors now at Merit that all echoed how Jesse and the Bell Financial team would be an incredible cultural fit," said David Wahlen, Executive Vice President/Strategic Partners of Merit Financial Advisors. "They said 'we need to get Jesse over to Merit,' and they were right. He is such a great addition and is completely aligned with driving our growth-focused mindset."

This marks Merit's 62nd acquisition overall and 10th partnership in 2026, continuing the firm's national expansion strategy of partnering with high-quality, growth-focused firms and teams. It follows the acquisition earlier this year of Merit's first office in Michigan, in the Detroit metropolitan area, which added approximately $213 million in total assets.

"It was critical that we find a partner that would allow our team to continue our tradition of providing extraordinary client service, while also giving our team members opportunities to grow personally and professionally," said Bell. "We found that as well as perfect alignment of mission at Merit and are thrilled to be partnered."

Bell Financial's acquisition marks the seventh by Merit from the broker-dealer since the announcement of Commonwealth's acquisition by LPL Financial last year. Other Commonwealth acquisitions include Global Wealth Advisors, Blueprint Wealth Advisors, TL Financial Group, GlennCo LLC, Strategic Retirement Partners, Pradel Financial Group and the Bridgeway Group. The transaction was finalized on August 14, 2026. The 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. (https://www.meritfinancialadvisors.com/)** Investment advice offered through Merit Financial Group, LLC, an SEC-registered investment adviser.

About Constellation Wealth Capital
Constellation Wealth Capital (CWC) is an alternative asset management platform dedicated to the wealth management sector. CWC provides flexible, long-term capital solutions and strategic advisory support to scaled wealth management platforms,

leveraging deep industry expertise and an extensive network of relationships to help partner firms accelerate growth and create long-term value. Learn more at **www.constellationwealthcapital.com (https://www.constellationwealthcapital.com/)**.

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Merit Financial Advisors

At Merit, planning for what matters to you is our job.

We have a team of dedicated individuals desiring to educate you on how to be financially wise, preserve and invest the money you have accumulated, help build a legacy for you and help the next generation reach their financial potential.

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