

O’Reilly LLC Joins Millenia Investments, Affiliates With Osaic

St. Louis-area firm overseeing approximately $250 million in client assets joins Millenia Investments in full-circle succession story

Osaic, Inc. (“Osaic”), one of the nation’s largest providers of wealth management strategies, today announced that **O’Reilly LLC** has joined **Millenia Investments LLC (“Millenia Investments”)** and affiliated with Osaic. Led by **Patrick O’Reilly, CFP®**, the Chesterfield, Missouri-based firm oversees approximately $250 million in client assets and was previously affiliated with LPL Financial.

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investors, professionals, small and midsized business owners and ERISA retirement plans. Patrick has joined Millenia Investments as a financial advisor, while Carrie Wyatt has joined as a service advisor support specialist.

“This partnership represents an exciting next chapter for our clients and our team,” said **Patrick O’Reilly**, principal owner of O’Reilly LLC. “Millenia Investments shares our commitment to personal service and long-term relationships. Through its affiliation with Osaic, we will have access to expanded technology and investment resources that can help us deliver an even more connected and convenient experience for the families and businesses we serve.”

The announcement marks a full-circle moment for the two firms. Michael O’Reilly was one of Millenia Investments President Stephen Serati’s earliest mentors, and Serati previously served as Michael’s first succession partner before Patrick joined the family business. Decades later, the firms are coming together to build upon their shared history and commitment to serving clients.

“Michael had a profound influence on my career, so welcoming Patrick, Carrie and the O’Reilly team to Millenia Investments is especially meaningful,” said **Stephen Serati, AIF®, BFA™, WMS**, president of Millenia Investments. “Our firms share deep roots in the St. Louis community and a common belief that strong financial guidance begins with trust. We look forward to honoring the O’Reilly legacy while creating new opportunities to serve clients for generations to come.”

Millenia Investments is led by **Serati** and **Samantha Estrada, BFA™**, executive manager and registered principal. Through Osaic, the combined firm will have access to resources including the OneView consolidated reporting platform and Osaic’s DirectChoice and Wealth Management Platform investment solutions, as well as advanced tax planning software, which will support deeper planning conversations and play an important role in the firm's relationships with higher net worth clients.

“Millenia Investments and O’Reilly LLC have built enduring businesses by putting relationships first,” said **John DiMonda**, co-head of the Osaic Independent Channel. “Their shared history, thoughtful approach to succession and commitment to the St. Louis community make this a natural fit. We are proud to support the combined team with the scale, technology and wealth management resources to pursue its long-term vision.”

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