Waverly Advisors Acquires InVista Advisors

July 28, 2026

Montgomery-based acquisition marks Waverly's fifth location in Alabama

BIRMINGHAM, Ala. — [July 28, 2026] — Waverly Advisors, LLC ("Waverly"), a federally registered investment adviser ("RIA") that specializes in investment management, financial planning and wealth management services for high-net-worth individuals, families, corporate retirement plans and institutional clients, has acquired InVista Advisors ("InVista"), a wealth management firm based in Montgomery, Alabama with approximately $332 million in assets under management ("AUM") (as of 7.21.2026). The acquisition further strengthens Waverly's presence in Alabama, representing the firm's fifth location in the state.

Founded by Carl "Brandt" McDonald, Chief Executive Officer, and Michael Barranco, Chief Operating Officer, and strengthened by the leadership of Austin Barranco, Partner and Financial Advisor, InVista has earned a reputation as one of Montgomery's premier wealth management firms through its commitment to providing personalized advice, building meaningful client relationships and remaining involved in the local community. Guided by its core values of community, connection and unity, the firm delivers comprehensive wealth management solutions to individuals, families and business owners while fostering a culture built on trust, collaboration and service. InVista is supported by a team of eight professionals who are dedicated to helping clients pursue their financial goals with confidence. McDonald, Michael Barranco and Austin Barranco will join Waverly as Partners and Wealth Advisors.

"InVista has built an outstanding reputation within the Montgomery market," said Justin Russell, President and CEO of Waverly. "This acquisition expands Waverly's presence in Alabama and strengthens the firm's ability to serve clients across the state, while bringing together two firms that share a deep commitment to people, planning and long-term growth."

“Joining Waverly marks an exciting new chapter for the team, and most importantly, our clients,” said McDonald. “Waverly’s scale and resources will strengthen our ability to serve clients while preserving the personalized client experiences and trusted client relationships that have always defined InVista, further positioning us to deliver even greater value to our clients for generations to come.”

“The InVista team has worked tirelessly to build a firm defined by exceptional client service and culture of excellence,” said Michael Barranco. “This transaction marks a defining new chapter – one that expands opportunities for our employees and deepens our commitment to the clients we serve. Waverly’s proven track record of growth and collaboration made them the clear choice as our long-term partner, and we look forward to everything we can accomplish together.”

“The responsibility we carry goes far beyond managing assets; it is about helping clients make confident decisions, steward their resources wisely and build lasting financial strength,” said Austin Barranco. “Waverly gives us greater depth to fulfill that responsibility for families, business owners and nonprofit organizations while preserving the trust, transparency and personal relationships at the heart of our work.”

The acquisition of InVista marks Waverly’s 35th transaction since accepting an equity investment in December 2021 from Wealth Partners Capital Group (“WPCG”) and HGGC’s Aspire Holdings platform. The transaction closed on July 24, 2026.

“This transaction reflects Waverly’s continued success in executing a highly strategic and selective acquisition strategy,” said Mac Selverian, Partner at WPCG. “InVista has built a strong business with an impressive leadership team and a well-established presence in the Montgomery market. This transaction further expands Waverly’s footprint and underscores its position as one of Alabama’s leading wealth management platforms.”

About Waverly

Waverly Advisors, LLC (“Waverly”) is a fee-only federally registered investment adviser that serves the investment management and wealth planning needs of a diverse group of clients, including high-net-worth individuals and families, corporate retirement plans, trusts, endowments and institutions. Waverly manages approximately $35.6 billion in assets (as of 7.27.2026) and offers collaborative investment, tax, estate and financial planning services. Founded in 1999 in Birmingham, Alabama, the company has 53 offices across the U.S. and a team of nearly 500 professionals who hold many of the industry’s most prestigious credentials. For more information, please visit www.waassetstg.wpengine.com (http://www.waassetstg.wpengine.com).

About Wealth Partners Capital Group

Wealth Partners Capital Group (“WPCG”) is a financial services holding company, which invests in and partners with select leading wealth management firms. WPCG supports its partners’

growth by providing capital, organic growth opportunities and strategic M&A expertise, identifying and evaluating wealth advisory practices for its partners to acquire and integrate. For more information, please visit www.wealthpcg.com (http://www.wealthpcg.com).

About HGGC

HGGC is a values-driven, partnership-focused private investment firm. The firm's ecosystem of investors, operators and professionals are united by the shared mission to develop leading enterprises and build long-term value together. HGGC invests in technology, business services, financial services and consumer enterprises. The firm is based in Palo Alto, CA and manages over $10 billion in assets under management (as of 12.31.2025). Since its inception in 2007, HGGC has completed more than 600 platform investments, add-on acquisitions, recapitalizations and liquidity events with an aggregate transaction value of over $71 billion. HGGC makes investments in RIAs via its Aspire Holdings platform, which is targeting $300 million of total investment in the space. For more information, including a complete list of current and former investments, please visit www.hggc.com (https://www.hggc.com).

Disclosure: Waverly is an independent investment adviser registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training. More information about Waverly, including investment strategies, fees and objectives can be found in Waverly's ADV Part 2A Brochure, which remains available upon request or by visiting Waverly's website at https://waverly-advisors.com/adv-part-2a-brochure. (https://waverly-advisors.com/wp-content/uploads/Waverly-ADV-Part-2A-Brochure-_7.10.2026-FINAL.pdf?ver=1790710244)

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