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NEWSROOM

Wealth Enhancement Announces Acquisition of Servo Wealth Management, an Independent RIA with Over $210 Million in Client Assets

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This partnership brings the firm's total client assets to more than $161 billion.

Wealth Enhancement, a national independent wealth management firm dedicated to enriching clients' lives, announced it has acquired the investment advisory business of Servo Wealth Management, an independent RIA in Oklahoma City, Oklahoma. Led by Owner and Founder Eric Nelson, CFA®, the team manages more than $210 million in client assets.

Jeff Dekko, Chief Executive Officer of Wealth Enhancement, said, "Eric has spent decades helping clients make thoughtful decisions with their long-term success in mind. He's earned the trust of generations of families and has been a steady presence as markets have changed. We're excited to welcome Eric and his clients to Wealth Enhancement and build on the relationships he's established over the years."

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physicians, attorneys, executives, small business owners, and retirees. The firm emphasizes a disciplined, straightforward approach to investing designed to help clients achieve and maintain financial independence while leaving a lasting legacy.

Prior to founding Servo Wealth Management, Eric Nelson worked at Equius Partners in Northern California, an experience he credits with helping shape his approach to investing and client service. His decision to join Wealth Enhancement brings him back together with the **Equius Team**, who joined Wealth Enhancement in 2023.

Eric Nelson said, “For my clients, joining the Equius Team at Wealth Enhancement is about bringing on the support and wealth management capabilities necessary to serve them through all stages of life. For me, personally, it’s also about reuniting with a team that was instrumental in helping me develop and grow as a financial advisor. This isn’t simply a business transaction; it’s about coming home.”

Jim Cahn, Chief Strategy Officer of Wealth Enhancement, said, “Eric’s history with the Equius Team makes this partnership especially meaningful. This relationship will help us make even more of an impact in Oklahoma and the greater South-Central region.”

The acquisition closed on August 15, 2026.

For more information about partnering with Wealth Enhancement, visit: **https://www.wealthenhancement.com/partner-with-us.**

About Wealth Enhancement
Wealth Enhancement is an independent wealth management firm with a passion for enriching clients’ lives through personalized financial planning and plan-led investing. The firm delivers comprehensive wealth management services, including investment management, tax strategies, estate planning, retirement planning, and insurance solutions for individuals, families, and businesses.

Founded in 1997, Wealth Enhancement combines specialized knowledge with a team-based approach and attentive service that helps each client craft their future. The firm serves clients through more than **194 offices** nationwide while maintaining strong local relationships. This partnership further strengthens Wealth Enhancement’s ability to serve clients throughout the South-Central region while preserving the personal relationships clients value. Learn more at wealthenhancement.com.

Advisory services offered through Wealth Enhancement Advisory Services, LLC (WEAS), a registered investment advisor. Securities offered through Wealth Enhancement Brokerage Services, LLC, member FINRA/SIPC.

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assets with Wealth Enhancement Brokerage Services, as of July 31, 2026. Servo Wealth Management had approximately $210 million in client assets as of August 5, 2026. With the addition of Servo Wealth Management and previously announced acquisitions, Wealth Enhancement will have more than $161 billion in client advisory, trust, and brokerage assets, including $6.1 billion in assets with Advisory Solutions Group, LLC, a registered investment advisor.

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Miramar Team Historical Media Apperances



Max Wasserman

MEDIA APPEARANCES

Dustin Smith Featured in “Minnesota’s $3 million estate tax threshold catches more families than the federal one”

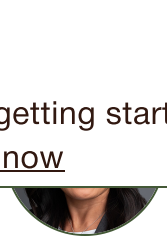


Dustin Smith

MEDIA APPEARANCES

FA Magazine: Ayako Yoshioka Featured in “Gated Alt Investment Clients Are Coming Back For More, Goldman Says”

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