KILPATRICK TOWNSEND

KT Client Success

Kilpatrick Townsend Represents Wealth Management Firm from Birth to $750 Million Exit

Early morning on May 16, 2019, Goldman Sachs announced the acquisition of Kilpatrick Townsend client and wealth management firm United Capital Financial Partners for $750 million. A team of 20 attorneys and paralegals from the firm's Mergers & Acquisitions and Securities, Employee Benefits, Financial Institutions, Investment Management, Tax, and Labor & Employment Teams helped guide United Capital through the months-long strategic process to identify a strategic investor for the company.

Kilpatrick Townsend began representing United Capital in 2005, shortly after the founders started the company, but before it had any revenues or clients. At that time, United Capital retained Mergers & Acquisitions and Securities Partner **Ben Barkley** to help design an acquisition program that would roll out the business across the country, and since then, he has led the acquisition of nearly 100 other investment advisers. Today, United Capital is the second largest independent investment adviser in the U.S., with over $25 billion of assets under management and more than 220 financial advisors, serving 22,000 clients across 90 U.S. offices.

The success of the transaction required a large team led by Ben and included Mergers & Acquisitions and Securities Team members **Lorie Mason**, **Sara Miller**, **Isabelle Dinerman**, **Joe Scibilia**, **Kelsey Donnalley**, **Bobby Seifter**, **Edgar Callaway**, **Giovanna Soto**, **Sabrina Rodrigues**, and **Kerrie Hanley**; Employee Benefits Team members **Jennifer Schumacher**, **Sterling Perkinson**, **Todd Castleton**, and **Carl Toppin**; Financial Institutions Team member **Aaron Kaslow**; Tax Team members **Lynn Fowler**, **Heather Preston**, and **Jeff Reed**; Investment Management Team members **Andrew Sachs**, **Jeffrey Skinner**, and **Ali Fenno**; and Labor & Employment Team member **Susan Pangborn**. The deal was widely reported in the press, with Kilpatrick Townsend being prominently recognized for representing United Capital.

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Kilpatrick

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