



CREWE
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WEALTH PARTNERS
CAPITAL GROUP

HGGC

Crewe Advisors to Establish Partnership with Wealth Partners Capital Group and HGGC
Utah-Based RIA will Receive Investment to Support Next Phase of Growth

SALT LAKE CITY, Utah, PALM BEACH, Fla. and PALO ALTO, Calif. – June 10, 2026 – [Crewe Advisors LLC](#) (“Crewe”), a Utah-based registered investment adviser (“RIA”), today announced it will enter into a strategic partnership with Wealth Partners Capital Group (“WPCG”), a financial services holding company, and HGGC, a values-driven, partnership-focused middle-market private equity firm. WPCG and the Aspire Holdings platform of HGGC will make a minority equity investment in Crewe to support the firm’s growth through both acquisitions and organic growth initiatives. The management team of Crewe will remain majority shareholders and continue to lead the firm’s operations.

Founded in 2015 by Managing Partner Ryan Halliday, Crewe is a wealth management firm based in Salt Lake City, Utah with an additional office in Scottsdale, Ariz. The firm provides comprehensive investment management, financial planning and family office services for individuals, families, entrepreneurs and executives. Crewe delivers personalized solutions tailored to each client’s needs, supported by a team with expertise spanning law, tax, investments, insurance, business planning and estate planning. As of June 2, 2026, Crewe had approximately \$3.3 billion in assets under management.

“We are excited to partner with WPCG and HGGC as we look to build on the momentum we have created,” said Ryan Halliday, Managing Partner of Crewe Advisors. “At Crewe, our fiduciary commitment to clients and our focus on building lifelong relationships have always been central to who we are. This partnership strengthens our ability to invest in our people, deepen our capabilities and expand our reach, while continuing to deliver the high level of service our clients have come to expect.”

“Since our first meeting with Crewe in 2019, it has been clear that Ryan and his team are building a differentiated business,” said Sean Bresnan, Founding Partner of [WPCG](#). “We’ve had the opportunity to watch Crewe grow into the exceptional firm it is today, anchored by a strong culture and a genuine commitment to client service, and we look forward to supporting its next phase of growth.”

“Crewe has developed a compelling wealth management and family office platform that helps their clients achieve financial harmony through thoughtful advice, exceptional comprehensive service and deep financial expertise,” said [HGGC](#). “We look forward to partnering with WPCG and Crewe as the firm continues expanding its capabilities and reach.”

The transaction is subject to customary closing conditions and is expected to close in June 2026. Financial and legal terms of the transaction will not be disclosed.

Moulton Moore Stella served as legal counsel to Crewe.

About Crewe Advisors



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Crewe Advisors (“Crewe”) is a fee-based, SEC-registered investment advisor providing comprehensive financial, estate, investment, tax, risk and philanthropic planning. The firm focuses on delivering objective, impartial advice via an open architecture model, always with the clients’ best interests in mind. Headquartered in Salt Lake City, Utah, Crewe had approximately \$3.3 billion in assets under management as of June 2, 2026. For more information, please visit www.creweadvisors.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.

About HGGC

HGGC is a values-driven, partnership-focused private investment firm. The Firm’s ecosystem of investors, operators, and professionals is 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, Calif. and manages over \$10 billion in assets under management as of March 31, 2026. More information, including a complete list of current and former investments, is available at www.hggc.com.

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