



FIRM NEWS

Lathrop GPM Represents Top 60 CPA Firm BerganKDV in Acquisition by Creative Planning

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ST. CLOUD (JUNE 13, 2023) – BerganKDV, a leading professional services firm, has joined forces with Creative Planning, one of the largest Registered Investment Advisors (“RIA”) in the country, strengthening BerganKDV’s ability to provide comprehensive client service. The deal marks one of the first acquisitions of a top 60 CPA firm by a major wealth management firm.

Following this acquisition, Creative Planning will have over \$210B combined assets under management and advisement across all 50 states and 65 countries as of 12/31/22, with continued plans for growth throughout 2023. The acquisition also will bring 600 new BerganKDV employees to Creative Planning.

Lathrop GPM is assisting BerganKDV in this acquisition led by [Bradford Barz](#) and associate Aly Brandvold.

Founded in 1945, BerganKDV has grown to offer a wide array of comprehensive business, financial and technology solutions including: tax and audit, accounting services, business advisory, wealth management, and more.

Creative Planning, LLC is an independent wealth management firm that provides a financial planning led investment management approach, retirement planning, estate planning, trust services, tax planning and family office services for individuals as well as 401(k) and institutional clients.

Learn more about the deal in a release from BerganKDV, [here](#).

Related People

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