

## THE BAHNSEN GROUP OPENS NEW PACIFIC NORTHWEST OFFICE

### *Sheppard Wealth joins The Bahnsen Group*

\$3.7 billion wealth management firm, The Bahnsen Group, has hired John Swanson and his team of Sheppard Wealth Management in Bend, Oregon. Swanson and his staff will stay in their current office in Bend, and The Bahnsen Group will re-locate advisor, Drew Dill, to assist in this expansion effort. The former business operation of Sheppard Wealth will fully integrate with the Bahnsen Group, entirely utilizing their investment solutions, operational apparatus, communications, content ecosystem, and holistic services platform. The transaction is expected to close by the end of this year's third quarter.

John Swanson has been the lead principal at Sheppard Wealth Management since 2014, having previously worked at Freestone Securities and the private bank of Wells Fargo.

"I could not be more excited to welcome a veteran like John and his team to our firm," said Bahnsen Group Managing Partner David Bahnsen. "We have dozens of clients in the Pacific Northwest that will now benefit from a geographical footprint. We believe John to be a stellar advisor whose clients will benefit immensely from the scale and depth of what The Bahnsen Group offers."

The Sheppard Wealth operation will be fully re-branded under The Bahnsen Group, and new hires are expected in the Bend, Oregon office.

"Everything about this transaction is to serve our clients better," says John Swanson, who will serve as a Private Wealth Advisor at The Bahnsen Group. "The Family Office offering of The Bahnsen Group, as well as huge focus on tax, estate, and planning integration in their wealth services, offer us a platform on day one. Our philosophy has always been simple – to help clients achieve confidence and understanding in their financial lives. Trust is earned in our business. Our alignment with TBG furthers this stewardship."

The Bahnsen Group continues to believe expensive M&A is an unneeded element in its growth strategy, instead focusing on organic growth with clientele who find themselves aligned with the firm's belief system and investment philosophy. Where there is an opportunity to add advisors who share TBG's cultural and ideological distinctions, select opportunities make sense in geographies where the firm has a client footprint. The Bahnsen Group hired the team of Story Capital into their new Minneapolis office in the summer of 2021 and opened a brand new office in Nashville, Tennessee, earlier this year. This new Bend, Oregon office is an ideal location for a Pacific Northwest hub.

"We take seriously the quality and depth of our services and really believe that the Sheppard Wealth clients are going to benefit from our offering," says Bahnsen. "We also believe that a consistent investment in new advisor talent, operations talent, and planning process is vital to our commitments to clients, and with this transaction, we are doing just that."

thebahnsengroup.com  
541.604.8603