

THE BAHNSEN GROUP OPENS NEW SANTA BARBARA OFFICE

Welcomes Advisory Veteran, Jeffrey Davis, from Raymond James

The Bahnsen Group has expanded into Santa Barbara, CA. This represents TBG's 14th office and its third in the state of California, having opened in Silicon Valley earlier in the year. Joining The Bahnsen Group from Raymond James is Jeffrey Davis, a multi-decade veteran who will serve as the office's senior advisor. Also joining the new expansion is Jeff's son, Jeff Davis Jr., who will serve as an Associate Private Wealth Advisor and driving advanced planning efforts, and new Operations Associate, Krista Knoles.

"We have long wanted to find the right advisory talent to open in this vital part of our home state," says TBG Managing Partner, David Bahnsen. "A father-son combo like this with deep industry experience, a wonderful client base, and a true commitment to serving clients represents a potent combination for what we want to accomplish in Santa Barbara."

The company has secured long-term office space on East Valley Road in Montecito. Additional hires are planned in the months and years to come.

"This door opening was a perfect solution," said Jeffrey Davis. "TBG's investment approach, depth of services, and commitment to excel all represented exactly what I was looking for in a final home for my career."

The Bahnsen Group was acquired by Hightower Advisors in a deal that closed last month. This office expansion and team hire was in motion before that transaction was announced. Additional hires and acquisitions are planned as part of an expanded growth strategy to add aligned teams, advisory talent, and succession opportunities to the industry-leading 30% annualized organic growth TBG has enjoyed for a decade. Assets under management are currently \$10.6 billion¹.

Earlier this month it was announced that The Bahnsen Group was acquiring Hightower Naples as a second Florida market presence. That deal will close at the end of the year.

1. Assets under management numbers are as of October 5th, 2026.

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