

Mercer Advisors Adds Kades & Cheifetz, a Pennsylvania-based RIA serving high net worth clients



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Mercer Advisors →

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DENVER, Oct. 2, 2024 /PRNewswire/ -- Mercer Global Advisors, Inc. ("Mercer Advisors"), a national Registered Investment Adviser (RIA), today announced the acquisition of Kades & Cheifetz LLC, a Pennsylvania based RIA.

Located in the suburbs of Philadelphia with additional coverage in Florida, Kades & Cheifetz delivers a highly customized financial service, seeking to create and preserve wealth for present and future generations. The firm's partners, Howard Kades and Stephen Cheifetz, take pride in building long-term relationships with their clients for whom they manage approximately \$440 million in assets.

"Joining Mercer Advisors allows us to free up our time to focus on serving existing and new clients. We thrive serving affluent families that want help creating and executing plans that secure their economic futures," said Kades.

Added Cheifetz: "We realized many clients were growing to expect more comprehensive support covering their full wealth picture. Mercer Advisors and the family office offering helps us solve this."

David Barton, Vice Chairman, who led the acquisition of Kades & Cheifetz on behalf of Mercer Advisors added: "Howard and Steve built an attractive clientele focusing in the affluent "Main Line" area that runs west of Philadelphia. Mercer Advisors has had a presence in this market for nearly three decades and we are excited to continue growing together in this region and beyond."

"When we met Howard and Steve, their unwavering commitment to always putting clients first was evident. Kades & Cheifetz is an exemplary and like-minded firm," said Dave Welling, CEO of Mercer Advisors. "We welcome them to our growing presence in Pennsylvania and Florida."

Kades & Cheifetz was exclusively advised by Colchester Partners.

About Mercer Advisors

Established in 1985, Mercer Global Advisors Inc. ("Mercer Advisors") is a total wealth management and financial planning firm that provides comprehensive, fee-based investment management, financial planning, family office services, retirement benefits and distribution planning, estate and tax planning, insurance solutions, and corporate trustee and trust administration services. Mercer Advisors Inc. is a parent company of Mercer Global Advisors Inc. and is majority owned by Oak Hill Capital, Genstar Capital, and Altas Partners. Mercer Global Advisors, Inc. is headquartered in Denver, Colorado, is privately held, has 1,150+ employees, and operates nationally through more than 90 locations. Mercer Advisors has \$63 billion in client assets. For more information, visit [merceradvisors.com](https://www.merceradvisors.com).

Important Information

Company statistics as of July 31, 2024. Client assets refer to client assets under management (AUM) and client assets under advisement (AUA) as well as assets gained from recent acquisitions where the advisory agreements have been properly assigned to Mercer Global Advisors, but the custodial accounts have yet to be transferred and/or the accounts have yet to be migrated to Mercer Global Advisors' portfolio management system.

Mercer Advisors is not a law firm and does not provide legal advice to clients. All estate planning documentation preparation and other legal advice is provided through select third parties unaffiliated to Mercer Advisors. Tax preparation and tax filing are a separate fee from Mercer Advisors' investment



management and planning services. Trustee services are offered through select third parties with which a client would engage directly, as such additional fees may apply. Mercer Global Advisors has a related insurance agency. Mercer Advisors Insurance Services, LLC (MAIS) is a wholly owned subsidiary of Mercer Advisors Inc. Employees of Mercer Global Advisors serve as officers of MAIS. MAIS provides individual life, disability, long term care coverage, and property and casualty coverage through various insurance companies.

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