



BELL NUNNALLY REPRESENTS INVESTMENT MANAGER FIRM KARPAS STRATEGIES IN SALE

August 08, 2024

Partner Ray A. Balestri and Senior Associate Joshua Smith and associates Vikram Kadiri and Matthew J. DeWitte represented Karpas Strategies, LLC, a Litchfield, Conn.-based independent investment manager serving ultra-high-net-worth families, foundations and trusts, in its recent sale to Akron, Ohio-based wealth management firm Sequoia Financial Group, LLC. Terms were not disclosed.

"We're pleased to join forces with Sequoia Financial, continuing our tradition of exceptional, highly personalized service for our clients," Karpas said in a Sequoia Financial-issued [press release](#). "And we are especially excited for our clients to benefit from the broad and deep resources Sequoia Financial has built and the specialized services available within the Sequoia Sentinel Family Office."

"Bell Nunnally's deal team, led by Ray Balestri, provided exceptional guidance throughout our process, ensuring a smooth and uneventful closing for our transaction. The team was quickly responsive to all our due diligence needs which allowed us to have great confidence from start to finish for this milestone event for our firm," said Matthew P. Karpas, Managing Director at Karpas Strategies.

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Mergers and Acquisitions

Practice Area Contact

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