

Newly-Formed Investment Advisor Seeks To Expand Southeast Presence  
Josh O'Neill, Assistant Editor , March 2, 2017

Crescent Wealth Advisory was launched by Tim Wyrobek and Jeff Taylor, the principals of Crescent Wealth Management.

Crescent Wealth Advisory, a recently-launched asset and investment advisory firm, has joined Dynasty Financial Partners' advisor network as it looks to expand its US footprint, particularly in the Southeast.

Dynasty develops, sources and integrates management capabilities for independent investment advisors.

Atlanta-based Crescent will use Dynasty's desktop and, as part of its integrated registered independent advisor platform, will leverage Fidelity Institutional Services for custody; Addepar for reporting; and Callan for separately-managed account manager research, Dynasty said in a statement.

Crescent's decision to join the network comes as it looks to grow its business while positioning itself as a desired destination in the Southeast US for advisors to join and grow their wealth management practices, it said.

To accomplish this, Crescent will also consult Dynasty for support and guidance on advisor acquisitions, as well as marketing, branding and technology, Dynasty said.

“Working with Dynasty Financial Partners, we are positioning our new firm for rapid future growth,” said Tim Wyrobek, a founder of Crescent Wealth Advisory.

He added: “Our partnership with Dynasty will also enable us to seize opportunities to expand our distinctive business model and become an attractive destination for top advisors to serve their clients.”