

# Mercer Advisors Acquires Blue Moon Wealth Advisory LLC

Acquisition in Bellevue, Washington Serves as Platform to Build Mercer's Pacific Northwest Presence

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**Mercer Advisors Inc. →**  
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SANTA BARBARA, Calif., Aug. 16, 2017 /PRNewswire/ -- Mercer Advisors Inc. ("Mercer Advisors"), a national Registered Investment Advisor (RIA) firm based in Santa Barbara, today announced the acquisition of Blue Moon Wealth Advisory LLC, provider of financial planning and investment management services with over \$90 million of assets under management.

Blue Moon was founded by Michael J. Greiner, CFP, in 2014 and is located in Bellevue, Washington near Mercer's current Bellevue office. Mercer will consolidate offices as part of its efforts to expand its Pacific Northwest presence. Mr. Greiner states: "Mercer is a great fit for us, like Blue Moon they are a fee only firm that puts their clients first. It's all about doing what's best for our clients."

Dave Welling, CEO of Mercer, said, "Blue Moon's financial planning and comprehensive wealth approach is a strong cultural fit for us and we are excited to be continuing to build our presence in Washington state. Mike has built Blue Moon into a full-service provider of wealth management services and in partnership with Mercer we look forward to adding Mercer's scale and expertise in investments as well as our family office services such as estate and tax planning."

Mercer Vice Chairman David Barton, who leads the company's M&A activity, said, "A financial planner's greatest asset is time. Too often, smaller RIAs get weighed down managing non-core yet essential elements of the business: operations, systems, IT, investments, compliance, reporting, etc. While important to the business, these back-office tasks create distractions that often prevent planners from doing what they do best – growing their client base and providing valuable advice to existing clients. The Mercer team functioning across multiple departments, such as investments, marketing, training, accounting, IT, and compliance, can relieve advisors of middle- and back-office responsibilities and provide leverage for planners to expand and service their client base. Finally, our national sales force helps these new Mercer additions grow organically, that's our secret sauce."

This transaction increases Mercer's assets under management to approximately \$11 billion, with 7,700 clients nationwide.

### About Mercer Advisors

Established in 1985, Mercer Advisors Inc. is a total wealth management firm that provides comprehensive, fee-only investment management, financial planning, family office services, retirement benefits and distribution planning, estate and tax planning, asset protection expertise, and corporate trustee and trust administration services. Mercer Advisors is the parent company of Mercer Global Advisors, one of the largest Registered Investment Advisors and financial planning firms in the U.S. with approximately \$11 billion in assets under management and more than 7,700 clients.

Headquartered in Santa Barbara, California, Mercer Advisors is privately held, has over 200 employees, and operates nationally through 24 branch offices across the country. For more information, visit [www.merceradvisors.com](http://www.merceradvisors.com).

Data as of August 10, 2017. Includes AUM, client, and personnel statistics from Kanaly Trust, a wholly owned subsidiary of Mercer Advisors.

Contact: Chris Tofalli

Chris Tofalli Public Relations, LLC

914-834-4334

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