

## Creative Planning Announces Strategic Investment from TPG Capital

September 30, 2024

OVERLAND PARK, Kan. & SAN FRANCISCO--(BUSINESS WIRE)--Sep. 30, 2024-- Creative Planning ("the Company"), a leading independent wealth management firm, today announced that TPG (NASDAQ: TPG), a leading global alternative asset management firm, has made a substantial minority investment in the Company. TPG is investing in the business through TPG Capital, its U.S. and European private equity platform. Terms of the transaction were not disclosed.

TPG Capital joins existing investor General Atlantic, who made a [minority investment in 2020](#), to provide additional resources and expertise to help Creative Planning continue to enhance its service offerings and growth trajectory. Creative Planning President and Chief Executive Officer, Peter Mallouk, will continue to lead the business and maintain a majority stake.

Creative Planning is a fast-growing, leading independent wealth management firm that provides comprehensive financial planning-led wealth management solutions, delivering a best-in-class client experience. A trusted partner with a track record of client-led success, Creative Planning and its affiliates currently have more than \$375 billion in combined assets under management and advisement across all 50 states and 90 countries.

"This new investment from TPG Capital is recognition of the unique value we create for our clients and the growth and expansion opportunities ahead for our business," said Mallouk. "We are excited to partner with a trusted investor like TPG, with a well-known global reputation, who shares our vision of leveraging our planning-led approach and people-first culture to better serve clients through every phase of their financial lives."

"As clients are increasingly seeking out holistic wealth management solutions, Peter Mallouk and Creative Planning have built an unparalleled business in the space with a track record of success by offering services that address clients' unique needs," added Peter McGoohan, Partner at TPG Capital. "We look forward to working closely with Peter and Creative's impressive management team and advisors to invest behind the Company's continued growth and expansion."

"In our over four years of partnership together, Creative Planning has continued to build on its reputation as an industry-leading wealth management firm with deep client focus and a unique servicing offering. We are thrilled to continue to support Peter and the excellent team at Creative Planning as they execute their long-term vision for the Company," said Paul Stamas, Managing Director and Global Head of Financial Services at General Atlantic.

Goldman Sachs acted as exclusive financial advisor to Creative Planning, and Paul Weiss provided legal counsel. J.P. Morgan Securities LLC and RBC Capital Markets acted as financial advisors to TPG Capital, and Davis Polk provided legal counsel.

### About Creative Planning

Creative Planning, LLC is an independent wealth management firm that provides a financial planning led investment management approach, retirement planning, estate planning, trust services, tax planning and family office services for individuals as well as 401(k) and institutional clients. Creative Planning and its affiliates have more than \$375 billion in combined assets under management and advisement across all 50 states and 90 countries as of December 31, 2023. United Capital Financial Advisors is an affiliate of Creative Planning.

### About TPG

TPG is a leading global alternative asset management firm, founded in San Francisco in 1992, with \$229 billion of assets under management and investment and operational teams around the world. TPG invests across a broadly diversified set of strategies, including private equity, impact, credit, real estate, and market solutions, and our unique strategy is driven by collaboration, innovation and inclusion. Our teams combine deep product and sector experience with broad capabilities and expertise to develop differentiated insights and add value for our fund investors, portfolio companies, management teams, and communities. For more information, visit [www.tpg.com](http://www.tpg.com).

### About General Atlantic

General Atlantic is a leading global growth investor with more than four decades of experience providing capital and strategic support for over 520 growth companies throughout its history. Established in 1980 to partner with visionary entrepreneurs and deliver lasting impact, the firm combines a collaborative global approach, sector-specific expertise, a long-term investment horizon, and a deep understanding of growth drivers to partner with great entrepreneurs and management teams to scale innovative businesses around the world. General Atlantic has approximately \$83 billion in assets under management inclusive of all products as of June 30, 2024, and more than 300 investment professionals based in New York, Amsterdam, Beijing, Hong Kong, Jakarta, London, Mexico City, Miami, Mumbai, Munich, San Francisco, São Paulo, Shanghai, Singapore, Stamford and Tel Aviv. For more information on General Atlantic, please visit: [www.generalatlantic.com](http://www.generalatlantic.com).

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Source: TPG