

# Private Equity Is Increasingly Leaning into Financial Advice's Middle Market: AdvizorPro

*As competition for mega-deals heats up, private equity firms are heading to medium-sized, scalable registered investment advisors.*

ATLANTA, GA, UNITED STATES, September 4, 2025 /EINPresswire.com/ -- [AdvizorPro](#), a leading wealth management and financial advisor intelligence platform for smarter prospecting, today released research that private equity (PE) firms are becoming more interested in mid-sized registered investment advisory (RIA) firms as the average funds per firm fell this year although in aggregate assets increased 14 percent to \$6 trillion in assets under management (AUM). This comes after PE firms have already pursued investments in major aggregator firms over the last decade.

"While the trade industry headlines have been focusing on multi-billion-dollar platforms such as Captrust, our data shows that there is an accelerating wave of investment into smaller firms such as MN Wealth Advisors," said [Michael Magnan](#), founder and chief executive officer of AdvizorPro. "It seems that private equity firms are seeking more scalable regional firms that can then be rolled up into larger growth strategies over time."

PE-funded RIAs currently make up less than four percent of the industry, although from an asset perspective they account for one quarter. This year, there are 81 RIAs with less than \$1 billion in assets that are backed by PE firms, up from 62 in 2024.

"Identifying this trend of private equity firms scaling the largest platforms while also seeding future growth in mid-sized roll-ups will help firms in this category best determine their future trajectory and, if it involves a sale, how to achieve the greatest value," [Hesom Parhizkar](#), AdvizorPro's co-founder and chief product officer.

Additional notable private equity trends from AdvizorPro's research include:

PE-backed RIA firms increased 16 percent to 295 firms.

Average AUM from PE-funded RIAs decreased from \$2.45 billion to \$2.31 billion

RIA firms with PE backing grow faster than their counterparts with a three year compound annual growth rate of 30.7% versus 13.9%.

Financial advisors and PE firms interested in discussing this data can find Magnan at this year's Future Proof Festival in Huntington Beach in early September.

To read the full report, go to <https://advizorpro.com/post/private-equity-ownership-ria-space-2025>

## About AdvizorPro

The premier intelligence platform for the wealth management industry, AdvizorPro delivers unparalleled breadth and depth of data on RIAs, family offices and other key financial professionals. Utilized for smarter prospecting to streamline outreach and target the right people, AdvizorPro leverages AI and advanced data technology to transform complex data into actionable insights. Its intuitive platform, robust API and seamless CRM integrations ensure that sales and marketing teams can access, analyze and act on the most accurate and up-to-date industry intelligence available. Learn more at AdvizorPro.com.

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