

Summit Wealth Group Announces Merger with Premier Private Wealth

Merger will Launch Summit Family Office Services to Meet Increased Demand from Ultra-High-Net-Worth Families

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Michael Comstock

Wealth Group (“Summit”), a growing independent registered investment advisory firm, announced today its merger with Premier Private Wealth (“PPW”), a Nashville-based wealth management firm with \$470 million in assets under management (AUM). The combined firms will increase Summit's AUM to approximately \$3 billion and expand its footprint in Tennessee.

The merger will introduce Summit Wealth Group Family Office Services, a dedicated offering built to meaningfully enhance the firm's capabilities for serving high-net-worth (HNW) and ultra-high-net-worth (UHNW) families. With this

offering, Summit will provide comprehensive services - including investment oversight, estate and wealth transfer planning, advanced tax planning, family governance, multi-generational engagement and education, philanthropy and legacy planning, and overall family well-being support - to ultra-high-net-worth families. These services will be delivered through a combination of in-house talent and carefully selected external partners.

Michael Comstock, CFP®, CEO of Premier Private Wealth, will assume the newly created role of Head of Family Office Services at Summit Wealth Group. He will continue in his advisory role and lead the new Summit office located in Franklin, Tennessee, while also joining Summit's executive leadership team.

Randy Morris, CEO of Summit Wealth Group, said, “Our clients have always been at the center of every decision we make. The merger with PPW strengthens our commitment to our clients by bringing on deeper knowledge, broader capabilities, and a shared vision for delivering an exceptional client experience. We're excited to welcome Michael and his talented team to the Summit family, and for the opportunity this partnership creates for our clients, our team, and the future we're building together.

"Our decision to join Summit Wealth Group comes from shared values and a long-standing relationship built on trust," said Michael Comstock, CFP®, incoming Head of Family Office Services. "Families of significant wealth need more than investment management—they need an integrated approach that supports the family's financial, human, and social capital. By merging with Summit Wealth Group, we are building a multi-generational solution with deeper support and broader resources, while maintaining the personal, relationship-driven care that has always defined us."



Randy Morris, CEO of Summit Wealth Group

The merger comes on the heels of the appointment of three senior leadership hires at Summit Wealth Group. Scott Wilkinson joined the firm as Chief Compliance Officer, Chelsea Ganey, CFA® joined as Chief Investment Officer, and Seamus O'Brien, CFP® was named Head of Advisor Success. Summit Wealth Group entered a strategic minority investment with Constellation Wealth Capital in June 2025, positioning the firm to make targeted investments in talent, infrastructure, and capabilities to support growth.

About Summit Wealth Group

Founded in 2002, Summit Wealth Group is a Registered Investment Advisor that helps clients gain clarity and confidence in their financial lives. With offices across Colorado, Mississippi, Arizona, South Dakota, and Tennessee, the firm offers comprehensive financial planning and investment management grounded in a relationship-first philosophy. Summit is a fee-based fiduciary, committed to always acting in the best interests of its clients. Learn more at www.summitwealthgroup.com.

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