

# Meredith Wealth Planning Surpasses \$500 Million in Assets Under Management

*Independent, flat-fee advisory firm reaches milestone less than seven years after launching with zero clients and zero assets under management*

MARYVILLE, IL, UNITED STATES, February 19, 2026 /EINPresswire.com/ -- [Meredith Wealth Planning](#), LLC, an independent, SEC-registered investment advisory firm, today announced that it has surpassed \$500 million in assets under management. The milestone marks a significant chapter for the firm, which founder Mark Meredith launched in March 2019 with no clients, no assets, and a vision for a more transparent approach to financial advice.

Since its founding, Meredith Wealth Planning has grown to serve more than 200 clients across 21 states. The firm distinguishes itself through a flat-fee model, charging clients a straightforward annual planning and investment management fee rather than the percentage-of-assets pricing common throughout the industry.

“Reaching \$500 million is a milestone I’m incredibly proud of, but what it really represents is the trust that more than 200 families have placed in us,” said Mark Meredith, founder and principal of Meredith Wealth Planning. “People are recognizing that flat-fee financial planning and investment management is a more equitable and transparent model. They’re tired of the conflicts of interest that come with traditional asset-based fees and commission-driven product sales. I built this firm to be different, and our growth shows that resonates.”

Under a traditional assets-under-management fee structure, advisors charge a percentage of a client’s portfolio, typically around one percent, which can create misaligned incentives and result in significantly different fees for clients receiving similar levels of service. Meredith Wealth Planning’s flat-fee approach is designed to eliminate those conflicts, ensuring that the firm’s advice is driven solely by what is in the best interest of the client.

The firm’s growth has been supported by the addition of Scott Wimmer, CFA, CFP®, EA, who joined Meredith Wealth Planning in 2022 as Lead Financial Advisor. Since joining, Wimmer has served all of the firm’s new clients, playing a central role in the continued expansion of the practice.

Looking ahead, Meredith Wealth Planning plans to continue its measured growth, expanding its advisory team one advisor at a time to maintain the personalized service and close client relationships that have defined the firm since day one.

## About Meredith Wealth Planning

Meredith Wealth Planning, LLC is an independent, SEC-registered investment advisory firm headquartered in Maryville, Illinois. Founded in 2019 by Mark Meredith, the firm provides tax planning and investment management services to more than 200 clients across 21 states. Meredith Wealth Planning operates on a flat-fee model, offering transparent and conflict-free financial guidance. For more information, visit [www.meredithwealth.com](http://www.meredithwealth.com).

Mark Meredith

Meredith Wealth Planning

+1 618-744-6755

[email us here](#)

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[X](#)

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