Wellspring Financial Partners Joins Parkwoods Wealth Partners

Wellspring Financial Partners, a $1.2B Tucson-based RIA, joins Parkwoods Wealth Partners, significantly expanding its Retirement Plan Services.

ST. LOUIS, MO, UNITED STATES, June 9, 2026 /EINPresswire.com/ -- Parkwoods Wealth Partners today announced that Wellspring Financial Partners has joined Parkwoods. Wellspring is a Tucson-based registered investment adviser with over $1.2 billion in assets under advisement as of year-end 2025. The combination, which closed on May 29, 2026, significantly expands Parkwoods' Retirement Plan Services platform and establishes a Tucson presence within Parkwoods' national footprint.

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>
> *Pat Zumbusch*

Founded by Pat Zumbusch, Wellspring serves individual wealth clients alongside a substantial book of employer-sponsored retirement plans, with a distinctive emphasis on participant education. The firm was named one of USA TODAY's 2026 Best Financial Advisory Firms. Wellspring's investment approach – fee-only, globally diversified, and evidence-based – aligns directly with Parkwoods' Purpose First Planning philosophy. Pat will join Parkwoods as Head of Wellspring Solutions and Head of the Tucson Office, with a continued focus on participant education across the Parkwoods Retirement Plan Services platform.

"Welcoming Pat and the Wellspring team is about shared beliefs first and foremost," said Al Sears, Founder & CEO of Parkwoods Wealth Partners. "Pat has built a remarkable firm on the same fee-only, evidence-based, planning-first approach our clients expect – and he has built it at meaningful scale. What Wellspring has done around helping employers and employees prepare for retirement is exactly the kind of work we want to amplify."

"For years I've talked about a goal of helping 250,000 people retire with confidence and clarity," said Pat Zumbusch, Founder and CEO of Wellspring Financial Partners. "That isn't a marketing line – it's the reason our team comes to work. Reaching that number takes a platform, and Parkwoods is the right one. We share the same essential values and beliefs. Joining Parkwoods is the most direct way I've found to keep doing what we've been doing in Tucson – and to do it for many more families and employees who need it."

“The quality of a retirement plan ultimately shows up in the participant experience – in whether the employee saving in their 401(k) actually understands what they’re doing and feels confident about it,” said John Resurreccion, CFP®, Head of Retirement Plan Services at Parkwoods. “Pat and the Wellspring team have built and maintained a comprehensive participant education practice focused on helping employees make informed retirement decisions through ongoing education and engagement. Bringing that into Parkwoods Retirement Plan Services means more plan sponsors – and many more employees – can benefit from the kind of clear, patient education that turns a 401(k) statement into a real path to retirement.”

“Investment philosophy alignment matters in a combination like this, and it doesn’t get much cleaner than what we have with Wellspring,” said Bob French, CFA, Chief Investment Officer at Parkwoods. “Both firms have built their portfolios the same way: globally diversified, low-cost, and evidence-based. We both start with the belief that investments support the plan, not the other way around.”

The Wellspring brand will transition to Parkwoods over the coming months, and Wellspring clients will continue to be served under the same planning-first, evidence-based approach, now backed by the broader Parkwoods platform. For plan sponsors and the employees they serve, the combination meaningfully strengthens Parkwoods’ Retirement Plan Services capabilities, particularly in the area of participant education for 401(k), 403(b), and similar employer-sponsored plans.

Parkwoods partners with advisory firms that share its fiduciary mindset and planning-centric, evidence-based approach – providing advisors with institutional resources while preserving boutique-level relationships. Wellspring’s combination of individual wealth and retirement plan service lines, anchored in evidence-based investing, makes this a natural fit. For advisors who share this philosophy and are considering the next chapter of their practice, Parkwoods welcomes that conversation.

Award Disclosure: The USA TODAY “Best Financial Advisory Firms” rating was published on April 15, 2026. The rating was developed by USA TODAY in partnership with Statista and is based on recommendations from clients, industry experts, and financial advisors, as well as growth in assets under management. Wellspring did not pay a fee to be included in the survey. The rating is not indicative of future performance and may not be representative of any one client’s experience.

About Parkwoods Wealth Partners
Parkwoods Wealth Partners helps individuals, families, and the employees of plan sponsor clients live purposeful financial lives through evidence-based investing and Purpose First Planning. By partnering with independent advisors, Parkwoods combines institutional resources with boutique flexibility, emphasizing fiduciary responsibility and enduring client relationships. Parkwoods is headquartered in St. Louis, with offices in St. Louis, Syracuse, Nashville, Tucson, Carmel, New Castle, and Lake Oswego, and advisors also based in Austin, Houston, Los Angeles,

and Salt Lake City.

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