

Balentine Expands Business Advisory Capabilities With Acquisition Of Valuation Growth Advisory

Tom Matthesen joins as Head of Business Advisory, expanding Balentine's distinctive approach to serving entrepreneurs and business owners

ATLANTA, GA, UNITED STATES, August 18, 2026 /EINPresswire.com/ -- [Balentine](#), an independent wealth management firm with more than \$9 billion in assets under advisement focused on serving families and business owners, today announced the acquisition of Valuation Growth Advisory (VGA), the Alpharetta, Ga.-based advisory firm founded by entrepreneur and financial strategist Tom Matthesen in an all stock transaction.

As part of the acquisition, Matthesen will serve as Head of Business Advisory within Balentine's Family Office Solutions group, led by Mark Bell, Chief Strategy Officer. The acquisition represents the next step in Balentine's long-term strategy to build a differentiated family office platform that integrates business advisory with wealth management for entrepreneurs and multigenerational families.



Tom Matthesen is leading Business Advisory services at Balentine after the acquisition of his firm, Valuation Growth Advisory, by the company.



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Matthesen brings more than three decades of experience helping middle-market companies improve performance, optimize capital structures, navigate complex financing situations, strengthen leadership teams, prepare for succession, and maximize value. The acquisition expands on Balentine's ability to serve entrepreneurs whose businesses often represent their



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Mark Bell, Chief Strategy Officer

largest financial asset, greatest source of wealth creation and often most enduring legacy.

"When we built Balentine's Family Office Solutions platform nearly a decade ago, we made a deliberate decision that serving successful entrepreneurs required far more than planning and investment management. For many entrepreneurial families, their business is both their largest asset and integral to their family's identity and legacy," said Mark Bell, Chief Strategy Officer and Head of Family Office Solutions. "The acquisition of VGA will allow us to double-down and amplify what is working for Balentine and missing from many of our peer firms. Tom's

distinctive expertise in helping owners build, finance, and grow their businesses strengthens one of our firm's core offerings and reinforces what we have built in the family office space."

Matthesen's career spans corporate lending, turnaround management, debt and equity advisory, executive leadership and entrepreneurship. He founded and successfully exited a specialty finance company before serving as CEO of Presidential Financial Corporation, where he led a significant turnaround and eventual sale to MidFirst Bank. Before founding Valuation Growth Advisory, he served as President of Thrive Farmers, helping to lead the company's growth as an enterprise serving nationally recognized brands including Chick-fil-A and Delta Air Lines.

"I've spent my career working alongside business owners as a lender, advisor, CEO and entrepreneur myself, and Balentine is the perfect fit when it comes to joining forces to serve entrepreneurs," said Matthesen. "Balentine understands what it means to build something from the ground up and has a deep appreciation for the opportunities and challenges entrepreneurs face, because they have lived that experience. Together, we're helping owners not only build more valuable businesses, but connect those businesses to the lives, families, and legacies they're working to create."

The addition of VGA enhances Balentine's ability to advise clients at the intersection of business, wealth, and family—bringing together business advisory, investment management, private capital, and family stewardship to help entrepreneurs make decisions that strengthen both their enterprises and their legacy. For VGA's clients, the acquisition means continued access to the advisors they know, now backed by a broader team and expanded capabilities to support every stage of their financial and business journey.

About Balentine

Balentine is an independent wealth management firm that helps entrepreneurs and their families preserve and propel the wealth they have created across generations. Through its offices in Atlanta, Ga., and Raleigh, N.C., Balentine advises on approximately \$9 billion of client

assets and has repeatedly been recognized as a top financial planning and advisory firm by publications including Forbes, Barron's, The Financial Times, and Investment News. Balentine is a perennial winner of the Pensions & Investments Best Places to Work in Money Management Award. In September 2021, Chairman Robert Balentine and CEO Adrian Cronje, Ph.D., CFA released [First Generation Wealth](#): Three Guiding Principles for Long-lasting Wealth and an Enduring Family Legacy, a book to help wealth creators think through what it takes to build a meaningful legacy and best support future generations.

Balentine LLC ("Balentine") is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Balentine's investment advisory services can be found in its Form ADV Part 2, which is available upon request.

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