

**BharCap Partners announces an investment in GCG Advisory Partners**

*Fifth portfolio company investment for BharCap Fund II*

**Greenwich, CT – September 10, 2025** - BharCap Partners, LLC (“BharCap”) announces a strategic investment in GCG Advisory Partners (“GCG”), parent company of GCG Wealth Management. The GCG management team has rolled over significant equity in the transaction and continues to lead the firm. BharCap’s investment will be used to accelerate GCG’s acquisition strategy and further enhance the firm’s *Monetize & Scale* platform.

With more than \$3 billion in assets, GCG offers a differentiated platform providing liquidity and succession planning for established advisors, as well as flexible, best-in-class technology and tools for entrepreneurial advisors seeking to accelerate the growth of their businesses. BharCap’s investment will be used to accelerate GCG’s acquisition strategy and further enhance the firm’s *Monetize & Scale* platform.

**Joel Burris, President and Managing Partner of GCG, stated:**

*“We are thrilled to partner with BharCap as we enter this next stage of growth. From the very beginning, it was clear that BharCap was the right fit because they share our entrepreneurial mindset and deep understanding of what it takes to build and scale businesses. With BharCap, GCG can continue to build out a platform that not only includes our strategic relationship with Osaic, but also gives GCG the ability to develop an RIA platform for a dynamic world being reshaped by technology—without the legacy constraints. Our goal is not to be all things to all people, but to be the right place for the right partners.”*

**Bharath Srikrishnan, Co-Founder and Managing Partner of BharCap, commented:**

*“This transaction fits one of BharCap’s high-conviction themes. With its leading platform, diversified base of established advisors, and loyal client base, Joel and the team at GCG have built an excellent business. Together, we have multiple proven levers for future growth, given GCG’s recurring, fee-based model; the increasing adoption of financial planning services among our target clients; the continued migration of advisors to RIAs with a strong equity culture; and the substantial capital needed to finance succession planning. We are excited to partner with GCG and build upon the firm’s success.”*

**Ethan Wang, BharCap Co-Founder and Partner, added:**

*“We have spent several years looking for a firm like GCG. GCG is a high-quality platform*

*with a proven M&A track record. BharCap's entrepreneurial-driven culture, growth mindset, and strategic M&A playbook will reinforce GCG's opportunity to be a leading consolidator in the highly fragmented wealth management industry. Our sector expertise will help GCG capitalize on the significant opportunities ahead as the industry continues to evolve."*

Houlihan Lokey served as exclusive financial advisor, and Holland & Knight served as legal counsel to GCG. Simpson Thacher & Bartlett served as legal counsel to BharCap. Terms of the transaction were not disclosed.

### **About GCG Advisory Partners**

GCG Advisory Partners, LLC is an organization focused on legacy, succession, and M&A in the hybrid and independent RIA space. GCG Advisory Partners is the parent company of GCG Wealth Management and other financial services businesses. GCG provides capital, acquisition/succession strategies, and a robust technology platform for its partnering advisors. Additionally, GCG offers a support system and team environment to reduce advisors' operational headaches. With 13 office locations throughout the Southeast and the Midwest, the firm's advisors serve individual clients and small business owners across the country. For more information, please visit [www.gcgap.com](http://www.gcgap.com). For further information about GCG Wealth Management, please visit [www.gcgwm.com](http://www.gcgwm.com).

### **About BharCap Partners**

BharCap Partners, LLC is a private investment firm investing in businesses across the financial services industry, including financial technology and tech-enabled services, insurance distribution and insurance services, asset and wealth management, and tax and accounting services. BharCap manages approximately \$2 billion of capital. For more information, please visit [www.bharcap.com](http://www.bharcap.com).

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