

# NEWS

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## **\$3.7 Billion Merger Launches Balefire, a New Brand and Business Growth Strategy**

*Legacy teams from VisionPoint Advisory Group and Navitas Wealth Advisors unite around a bold, vision-driven platform to create enduring wealth, sustained business continuity, and family legacies – aligning wealth with purpose through open, values-based dialogue*

**Dallas, TX – May 6, 2025** – VisionPoint Advisory Group and Navitas Wealth Advisors have merged to form [Balefire](#), an SEC Registered Investment Adviser and comprehensive wealth management firm designed to meet the growing demand for integrated, high-capability financial and business advisory solutions for affluent individuals, families, and businesses. The new entity brings together over 60 professionals with complementary skillsets, offering comprehensive wealth management, strategic tax planning, and corporate solutions. Operating as a unified platform, Balefire is positioned to provide deeper insight, greater strategic continuity, and more scalable solutions.

[Advisor Growth Strategies](#) (AGS) served as Balefire’s M&A Advisor. AGS works with financial advisory firms and institutions to build their ideal future for their business. For over a decade, they have partnered with the nation’s fastest-growing and largest RIA firms to excel at every stage of business.

As a merger of two equals, the entity’s combined assets under management (AUM) topped \$3.7 Billion as of January 1, 2025. Mergers and acquisitions, along with robust organic growth and a focus on providing an incomparable client experience, will drive Balefire’s strategic business development plan, designed to more than 10x the company’s AUM over the next decade. Balefire’s vision includes expanding annual revenues to \$215 million, growing to \$42 Billion in AUM, and scaling the Balefire team to 300 elite professionals.

## **MORE THAN A MERGER: A FOUNDATION FOR WHAT'S NEXT**

The leadership team – composed of Jason Hester (former CEO of Navitas) and John Hoffman (former CEO of VisionPoint), now serving as co-managing partners – says the formation of Balefire is rooted in operational alignment, cultural fit, and a shared conviction around long-term impact.

“This combination is not about getting bigger – it’s about getting better,” said Jason Hester, Managing Partner of Balefire. “While our strategic plan does include revenue and profitability benchmarks, it also focuses on stewardship and the impact we can make together. We’ve built something that has real staying power for our clients and our team. Clients will see deeper bench strength, broader services, and the same personal connection they’re accustomed to. It’s not a shift in identity – it’s an expansion of what’s possible.”

## **A PLATFORM BUILT FOR COMPLEXITY AND CONTINUITY**

With partners and employees in 19 states and clients in 39 states, Balefire maintains a significant presence in Texas, Mississippi, Minnesota, Alabama, Arizona, Iowa, North Carolina, Georgia, Florida, and South Dakota, offering clients regional accessibility with national reach. Advisors operate within a single, collaborative framework to deliver a seamless, strategy-driven experience across all phases of wealth stewardship. The firm's integrated model allows it to scale customized services – such as succession planning, business transition consulting, and multi-generational family governance – without compromising the personal, values-based advisory relationships that are foundational to its model.

“With 66% of advisors eyeing a change due to limited growth, support, or a desire to build a better business model. Balefire is redefining partnership in wealth management,” said John Hoffman, Managing Partner of Balefire. “Our recent merger strengthened our frameworks, that give advisors more clarity, control, and alignment to seize better opportunities and navigate complexity – all on one team. Balefire is built for that.”

## **BALEFIRE: A SYMBOL OF ENDURING GUIDANCE AND DISTINCTION**

The Balefire logo is more than a design element – it’s a powerful metaphor for the firm’s mission and values. The flame emerging from the “f” is a subtle nod to both the firm’s name and its promise: to be the spark that ignites financial growth, the warmth that protects wealth, and the ever-present guide through each client’s unique journey.

“Throughout history, a balefire has been a powerful, towering flame that serves as a beacon, bringing people together in seasons of transition, fostering a sense of community and guidance,” said Stephanie Elton, Chief of Staff at Balefire. “Balefire’s logo and name together signal a firm that is not only sophisticated and exclusive, but also deeply committed to illuminating the way for those who have achieved exceptional success.”

## **ABOUT BALEFIRE**

Balefire is an SEC Registered Investment Adviser and comprehensive wealth management firm designed to meet the growing demand for integrated, high-capability financial and business advisory solutions for affluent individuals, families, and businesses. The merger of VisionPoint Advisory Group and Navitas Wealth Advisors – two equally successful firms – the new entity, as of January 1, 2025, stewards over \$3.7 Billion AUM, bringing together over 60 professionals with complementary skill sets, offering comprehensive wealth management, strategic tax planning, and corporate solutions.

Wealth advisors seeking increased capacity through operational and client support, enhanced long-term business value and succession planning, scalable growth through proven business development strategies, and access to cutting-edge investment and planning processes – along with greater enjoyment and lifestyle flexibility – are encouraged to reach out for a confidential conversation.

Affluent families interested in learning more about Balefire’s definition of wealth, structured three-phase approach to planning and wealth stewardship for generations, are encouraged to visit the website to learn more and connect with Balefire.

Corporate clients who want to optimize retirement plans, boost employee retention, maximize executive compensation while minimizing taxes, enhance liquidity while strengthening corporate financial resilience, facilitate seamless exit and succession planning, and build a lasting legacy through strategic philanthropy, are also invited to explore a working relationship.

Learn more at [www.BalefireWealth.com](http://www.BalefireWealth.com).

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