

## Crete adds Cabrillo Advisors

By [Michael Cohn](#) August 27, 2025, 12:46 p.m. EDT

Crete Professionals Alliance, a Tampa, Florida-based accounting and advisory network funded by Thrive Capital, has added Cabrillo Advisors, a San Diego, California-based provider of valuation and financial advisory services to clients across the U.S., Europe and Asia.

The Crete network provides tax, audits, bookkeeping and other services and has more than 20 firms in the U.S. Financial terms of the deal were not disclosed, but Crete took an equity stake in Cabrillo.



Earlier this year, Crete was named one of the 25 Fastest-Growing Firms by *Accounting Today* and announced plans to spend \$500 million to buy firms while upgrading them with artificial intelligence technology.

California is one of Crete's fastest-growing markets, and Cabrillo is expected to play a strategic role in expanding Crete's services and growth on the West Coast.

"We are delighted to welcome Cabrillo Advisors to the Crete network," said Crete Professionals Alliance CEO Steve Stagner in a statement Tuesday. "Their stellar reputation and proven track record in business valuations and financial opinions align perfectly with Crete's mission to deliver entrepreneurial, locally empowered service on a national scale. Together, we're redefining the landscape for our clients with leading-edge technology, seasoned talent and unparalleled industry expertise."

Cabrillo's services include business, security and intellectual property valuations; transaction-related valuations, including purchase price allocations and portfolio fair value; stock option-related valuations; expense calculations; trust and estate planning, including carried interest and gift valuations; and fairness opinions for M&A and financing transactions.

"This partnership ushers in a transformative chapter for Cabrillo Advisors," said Cabrillo chairman and CEO Wade Hansen in a statement. "By joining Crete Professionals Alliance, our private and public company clients, investors, boards, and high-net-worth individuals can now access the full breadth of integrated tax, audit, and accounting services available across Crete's national network — seamlessly complementing Cabrillo's core valuation and fairness opinion expertise. And through it all, our clients will continue working with the same Cabrillo leadership and dedicated team they know and trust."

Cabrillo Advisors' clients will gain access to Crete's enterprise-level support services in HR, finance, legal, information technology and more; AI-powered tools and automation solutions; global talent resources, with offshore teams in India and the Philippines; along with growth and recruiting infrastructure, plus future M&A capabilities.

Koltin Consulting Group CEO Allan Koltin advised both firms on the combination. "Congrats to Cabrillo and Crete on their newly formed combination," Koltin said in an email. "Wade Hansen and his team have built one of the top valuation firms in the country and Crete 'member' CPA firms will benefit greatly from these additional services to offer their clients."

Last year, Crete added Reid Tax & Advisory Services LLC, a firm with offices in Long Island, New York City, and Boca Raton, Florida. Other firms that have joined since 2023 include RRBB Accountants and Advisors in Somerset, New Jersey; Mendonca Partners in Union, New Jersey; Skwiersky, Alpert & Bressler LLP in New York City; AbitOs in Coral Gables, Florida; and Savastano, Kaufman & Co. in Fair Lawn, New Jersey.