

## Springline adds SD Mayer Advisory

By [Paige Hagy](#) March 19, 2026 3:16 p.m. EDT

Springline Advisory today acquired SD Mayer Advisory, expanding the Top 100 Firm's presence on the West Coast.

SD Mayer, based in the San Francisco Bay Area, is a full-service accounting, advisory and wealth management firm that services privately held businesses, nonprofits, and high-net-worth individuals throughout Northern California and across the country. SD Mayer joins Springline's platform but will retain its own name.

"From day one, we've built SD Mayer on entrepreneurial spirit, deep client relationships, and a commitment to doing the right thing for our people and our community," Stephen Mayer, founder and managing partner at SD Mayer, said in a statement. "Partnering with Springline allows us to invest even more in our team, expand our capabilities, including adding service lines we previously haven't offered, expand our Bay Area footprint, and bring additional resources to our clients — all while staying true to who we are as a firm."

Springline Advisory, based in Dallas, ranked No. 54 on *Accounting Today's* 2026 Top 100 Firms list. It reported nearly \$165 million in revenue, with 86 partners and over 770 total employees across 14 offices.

Springline was created by private equity firm Trinity Hunt Partners in January 2024. The firm has since completed a number of acquisitions, most recently adding Christy Paddock Advisors in January. It is one of the fastest growing firms, with 87.6% growth in revenue last year.



Springline Advisory CEO, Tim Brackney

"This partnership is a natural fit, not just strategically, but culturally," Springline Advisory CEO Tim Brackney said in a statement. "We're excited to welcome the experience and leadership this team brings to Springline. Together, we share a deep commitment to our people, our clients, and the communities we serve, and we're well-positioned to accelerate our expansion across the Bay Area and Northern California while continuing to deliver the high-touch, trusted service our clients expect."

Allan Koltin, CEO of Koltin Consulting Group, advised both Springline Advisory and SD Mayer on the transaction.

"Springline Advisory's expansion into the San Francisco Bay area is a meaningful step in their growth journey," Koltin said in a statement. "SD Mayer has earned a reputation for deep expertise and a genuine commitment to client service. Their team was especially enthusiastic about working with Springline's leadership team, whose culture, vision and approach resonated strongly with them. This partnership is about more than geography — it's about uniting firms that share a pragmatic mindset and a people-first philosophy. Springline remains highly selective in its M&A approach, and SD Mayer stood out as a firm that truly fits their values and ambitions."