



Collins Investment Group to Join Focus Partner Firm XML Financial Group, Expanding XML's Presence in the Washington DC Metro-Area

NEW YORK, NY / ACCESSWIRE / July 1, 2021 / [Focus Financial Partners Inc.](#) (NASDAQ:FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which [Collins Investment Group](#) ("Collins Investment Group" or "CIG"), a wealth management practice in Bethesda, Maryland, will join Rockville, Maryland-based Focus partner firm [XML Financial Group](#) ("XML"). The transaction is expected to close in the third quarter of 2021, subject to customary closing conditions.

Robert Collins founded Collins Investment Group in 2008 to provide comprehensive wealth and investment management services to high-net-worth clients located across the country. Over the last twenty years, Bob been in included in the Forbes [Best-In-State Wealth Advisors](#) list from 2019 to 2021, and in the Barron's [America's Top 1,200 Financial Advisor](#) list from 2016 to 2018 and 2020 to 2021, and in the Forbes [America's Top Wealth Advisors](#) list in 2020. This transaction will enable the CIG team to leverage XML's operational resources to support CIG's continued growth. CIG will also gain access to XML's expanded services and investment capabilities to enhance their clients' experiences. For XML, the addition of CIG will deepen its geographic presence in the broader Washington, DC market and further position the firm for growth in the Mid-Atlantic region. The CIG management team will join the XML leadership team, adding deep regional expertise.

"Like the CIG team, XML strives to provide outstanding wealth management solutions for our clients," said Brett Bernstein, CEO and Co-Founder of XML. "We are thrilled to welcome a team with CIG's reputation, which is a result of their longstanding commitment to personalized advice. We look forward to this deal closing in the fall and to many years of partnership and continued success."

"We are pleased the CIG team will be joining XML later this year," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This transaction not only expands XML's presence in the high-net-worth market in their local area, but also brings together two highly complementary businesses. It also further reinforces the value of Focus' scale, network, and highly differentiated M&A expertise to our partners. The business expansion our partner firms achieve via mergers is a powerful catalyst to the overall growth of our partnership."

About Focus Financial Partners Inc.

Focus Financial Partners Inc. is a leading partnership of independent, fiduciary wealth management firms. Focus provides access to best practices, resources, and continuity planning for its partner firms who serve individuals, families, employers and institutions with comprehensive wealth management services. Focus partner firms maintain their operational independence, while they benefit from the synergies, scale, economics and best practices offered by Focus to achieve their business objectives. For more information about Focus, please visit www.focusfinancialpartners.com.

About XML Financial Group

XML Financial Group ("XML") is an independent wealth and investment management firm headquartered in Rockville, Maryland. XML offers a suite of wealth and investment management services to high-net-worth individuals, businesses and families located across the country. For more information about XML, please visit www.xmlfg.com.

About the [Forbes Best-In-State Advisors](#) List

The Forbes ranking of Best-In-State Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

About the [Barron's Top 1,200 Financial Advisors](#) List

Advisors who wish to be ranked fill out a 102-question survey about their practice. That data is verified with the advisors' firms and with regulatory databases, and a rankings formula is then applied to the data to generate a ranking. The formula features three major categories of calculations: (1) Assets; (2) Revenue; and (3) Quality of practice. In each of those categories, multiple sub calculations are performed.

About the Forbes [America's Top Wealth Advisors](#) List

The Forbes ranking of America's Top Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

Cautionary Note Concerning Forward-Looking Statements

This release contains certain forward-looking statements that reflect Focus' current views with respect to certain current and future events. These forward-looking statements are and will be, subject to many risks, uncertainties and factors relating to Focus' operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to

Focus on the date of this release. Focus does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Focus may be found in Focus' filings with the Securities and Exchange Commission.

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