GW & Wade To Join The Colony Group In Major Transaction

NEW YORK, NY / ACCESSWIRE / March 1, 2024 / Focus Financial Partners Inc. ("Focus" or the "Company"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which GW & Wade, LLC ("GW & Wade"), headquartered in Wellesley, Massachusetts, will formally join fellow Focus partner firm The Colony Group, LLC ("Colony"). This transaction is expected to close in the first quarter of 2024, subject to customary closing conditions.

The transaction merges GW & Wade's $10.4 billion regulatory AUM as of 12/31/23, with Colony's $21.1 billion regulatory AUM as of 12/31/23. This also marks Focus' second signed intra-partnership merger as part of its new hub strategy.

GW & Wade, led by Principals Roger Wade and Tim Pinch, joined Focus in 2007 and has been a stalwart of the Focus partnership for years. The firm has extensive expertise in tax planning, financial planning, asset management, retirement and estate planning.

"We strive to have a positive impact on the lives of our clients and to help them achieve their financial goals, and we pride ourselves on developing long-lasting relationships built on trust," said Wade.

"We know Michael Nathanson and the Colony team share these values, which is one of several reasons we are excited to join forces with another industry leader in wealth management," said Pinch.

"It is important that we continually enhance our teams and services for our clients, and our view of the long-term future is bright as we welcome the GW & Wade team to Colony," said Michael Nathanson, CEO of The Colony Group and President of Focus. "Over the years, Focus has become home to many outstanding wealth management firms, and it is exciting to see two of them joining forces. We expect that, through opportunistic mergers such as this one, Focus will continue to facilitate the accelerated evolution of firms that choose such a path."

Following the merger, GW & Wade will operate as GW & Wade at The Colony Group.

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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 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 The Colony Group, LLC

The Colony Group, LLC is an investment advisory firm registered with the Securities and Exchange Commission ("SEC") with locations in California, Colorado, Connecticut, Florida, Maryland, Massachusetts, New Hampshire, New Jersey, New York, D.C and Virginia. Registration with the SEC does not imply a certain level of skill or training and does not imply that the SEC has endorsed or approved the qualifications of Colony or its representatives. With origins dating back to 1986, Colony's team provides individuals and families, executives, business owners, entrepreneurs, athletes and entertainers, institutions and non-profit organizations with deep expertise that goes beyond investment management and can encompass tax, estate, retirement and philanthropic planning, asset allocation and sustainable investing solutions, family office services, business management services, divorce and dispute resolution services, and life-enrichment services through Curated by Colony™. For more information about Colony, please visit www.thecolonygroup.com and follow Colony on LinkedIn.

About GW & Wade, LLC

GW & Wade, LLC is a financial advisory firm headquartered in Wellesley, Massachusetts, with additional offices in Palo Alto, California and Reston, Virginia. Since 1986, GW & Wade's team has served successful individuals and their families, providing extensive expertise in tax planning, financial planning, asset management, retirement and estate planning. GW & Wade also provides equity compensation and tax planning services and seminars for the executive management teams of public and private companies. For more information about GW & Wade, please visit https://www.gwwade.com.

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