# Regent Investment Management to Join Focus Partner Firm Bartlett & Co. Wealth Management, Expanding Its Midwest Presence

**NEW YORK, NY / ACCESSWIRE / December 2, 2022 /** 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 Regent Investment Management, LLC ("Regent"), an investment adviser based in Louisville, Kentucky, will join Focus partner firm Bartlett & Co. Wealth Management LLC ("Bartlett"). The transaction is expected to close in the first quarter of 2023, subject to customary closing conditions.

Regent provides customized wealth and investment management services primarily to high net worth individuals and families. The firm has a longstanding presence in Louisville and is led by three partners: Marty McClelland, Steve Naiser and Mary Jones. Regent's decades-long client relationships are attributed to a highly personalized client service offering. Regent seeks to invest with a long-term focus using a disciplined investment process. The combination with Regent expands Bartlett's geographical presence in the Midwest, adding to their current offices in Cincinnati and Chicago.

"We are excited to welcome the Regent team to the Bartlett family," said Holly Mazzocca, President of Bartlett. "We could not have found a better cultural fit than Marty and his team and believe that our complementary skillsets will enhance outcomes for all our clients. Our two firms were built on similar values and approaches to wealth management, making Regent a great addition to Bartlett as our second transaction since joining Focus Financial Partners in 2018."

"We prioritize doing the right thing for our clients above anything else, and it's clear that Bartlett has that same unwavering fiduciary commitment to theirs," said Marty McClelland, President of Regent. "This partnership allows us to continue to provide excellent service to our clients and improve our offerings by leveraging Bartlett's scaled platform and holistic financial planning capabilities."

"We are delighted that Regent will be joining Bartlett," said Rudy Adolf, Founder, CEO, and Chairman of Focus. "This transaction furthers Bartlett's presence in the Midwest, enhances their investment management offerings, and deepens trust & estate capabilities for their clients. Regent is the second acquisition Bartlett has made since joining the Focus partnership in 2018, reflecting our differentiated M&A capabilities on behalf of our partner firms to address the increasing complexities of serving high net worth clients as well as formalizing succession strategies."

**About Focus Financial Partners Inc.**

Focus Financial Partners Inc. (NASDAQ:FOCS) ("Focus") 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 Bartlett & Co. Wealth Management LLC**

Bartlett & Co. Wealth Management LLC ("Bartlett") is a Cincinnati-based wealth management firm, providing customized investment management and financial planning services to high net worth families, foundations and businesses. Bartlett takes pride in providing clients personalized fiduciary advice through a team of skilled investment professionals. For more information about Bartlett, please visit www.bartlett1898.com.

**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 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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**SOURCE:** Focus Financial Partners