



Cooper Lapman to Join Focus Partner Firm The Colony Group, Expanding Colony's Substantial Boston Presence in its Second Strategic Transaction Announced in 2022

NEW YORK, NY / ACCESSWIRE / December 27, 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 [Cooper Lapman Financial, LLC](#) ("Cooper Lapman"), a registered investment adviser based in Boston, MA, will join Focus partner firm The Colony Group, LLC ("Colony"). The transaction is expected to close in the first quarter of 2023, subject to customary closing conditions.

Founded in 2009, Cooper Lapman works with high net worth individuals and families. Led by Miriam "Mimmy" Cooper and Mark Lapman, the firm delivers broad wealth management services and investment expertise, creating individualized portfolios for clients. Cooper Lapman will expand Colony's substantial Boston presence through the addition of a talented team of experienced advisors. Colony will offer Cooper Lapman's clients enhanced support and access to a broader range of wealth management services, while also allowing the Cooper Lapman team to leverage Colony's operational infrastructure and its comprehensive service offering and investment capabilities. Mimmy and Mark will join Colony as Senior Wealth Advisors.

"Mimmy and Mark have built an impressive firm and, after many years of collaboration, we are delighted that they will be joining Colony," said Michael Nathanson, Chair and CEO of Colony. "They have a strong base in Boston as a result of their close, long-standing client relationships and an impressive advisory team. We are looking forward to our combined business making each firm better than before."

"We are pleased that the Cooper Lapman team will be joining Colony, marking the 24th merger on behalf of our partner firms and the 30th transaction overall that Focus has signed or closed year to date," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Cooper Lapman will expand Colony's already impressive share of the Boston wealth management market. The expertise of the Cooper Lapman team will further enhance Colony's deep bench of talented advisors and the client services they offer. Through our extensive industry relationships, together with our deep M&A expertise, Focus offers significant value to our partner firms in helping them attract leading teams and accelerate their growth."

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 The Colony Group, LLC

The Colony Group, LLC ("Colony") is an independent 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 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 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 ColonyTM. For more information about Colony, please visit www.thecolonygroup.com and follow Colony on [LinkedIn](#).

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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