



Focus Financial Partners Makes a Minority Investment in Luminary Platforms, Inc., a Technology Platform That Brings Efficiency and Integrated Access to Legacy Planning

NEW YORK, NY / ACCESSWIRE / February 14, 2023 / [Focus Financial Partners Inc.](#) (NASDAQ:FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has made a minority investment in [Luminary Platforms, Inc.](#) ("Luminary"), a technology platform that brings efficiency and integration to how advisors connect client assets with their legacy goals. This investment reflects Focus' commitment to further deepening the client solutions it offers its partner firms through its value-added programs.

Luminary, founded by David Barnard, Joe Lonsdale, Ian Lyons and Dave St. Geme in 2022, delivers integrated trust & estate planning capabilities, enabling advisors to collaborate with their clients on designing, managing and reporting sophisticated trust & estate strategies. Luminary's system of record technology is designed to power the next generation of advisor services by helping clients to fulfill their generational and philanthropic legacy objectives.

"We are excited to have Focus as an investor given their leadership position in the independent wealth management industry," said David Barnard, CEO and Founder. "We have a shared goal to enhance the ability of advisors to deliver highly personalized wealth management strategies and services to their clients. This investment will help us accomplish our mission of revolutionizing the trust & estates process, substantially increasing value to advisors and clients alike."

"Luminary is a technology platform that will deliver a scalable approach to legacy planning," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This platform will strengthen the ability of our partner firms to serve as strategic advisors to their clients in important areas such as intergenerational wealth transfer and philanthropy. We continue to invest in our value-added programs, which are designed to enhance client outcomes by improving our partners' service offerings."

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 Luminary Platforms, Inc.

Luminary Platforms, Inc. was founded in 2022 by a team of experienced industry experts and software business builders. Luminary is a collaboration platform powering how advisors connect client assets with legacy goals. Luminary helps advisors collaborate with their clients to design,

manage and report advanced trust & estate strategies, adding more value and building deeper relationships. For more information about Luminary, please visit <https://www.withluminary.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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