



Davis & Seiley Wealth Management to Join Focus Partner Firm HoyleCohen, Further Expanding HoyleCohen's Presence in the San Diego Wealth Management Market

NEW YORK, NY / ACCESSWIRE / November 29, 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 Davis & Seiley Wealth Management, Inc. ("Davis & Seiley"), a registered investment adviser ("RIA") located in La Mesa, California, will join Focus partner firm HoyleCohen, LLC ("HoyleCohen"), headquartered in San Diego, California. This transaction is expected to close in the first quarter of 2023, subject to customary closing conditions.

Founded in 2006, Davis & Seiley offers wealth and investment management services, and financial, estate, tax and retirement planning services to individuals and families. Davis & Seiley is led by its founders, Marc Davis and Joe Seiley, who collectively have almost 50 years of experience in the industry.

As a result of this transaction, Davis & Seiley will gain access to the expertise and operational strengths of HoyleCohen. HoyleCohen will gain an experienced team in both wealth and investment management that is dedicated to providing clients with high-touch, personalized service.

"I have admired HoyleCohen as another excellent fiduciary wealth manager for some time now and could not be more thrilled to be joining their team," said Marc Davis, Founder and President of Davis & Seiley. "We expect this transaction to enhance the services and resources we can offer our clients, and to provide our team with more opportunities to grow professionally while having a continued presence in our community."

HoyleCohen CEO and Senior Managing Director Mark Delfino added, "Marc Davis and I first met over a decade ago. I have seen the passion Marc, Joe and their team bring to their business, as well as their relentless devotion to their clients. Having Davis & Seiley join us will help us not only expand our presence in the San Diego area, but also add talented professionals and a strong base of clients to our growing team."

"We are delighted that Davis & Seiley will be joining HoyleCohen, marking the 21st merger on behalf of our partner firms and the 27th transaction we have signed or completed year to date," said Rudy Adolf, Co-Founder, CEO and Chairman of Focus. "Since becoming a Focus partner firm in 2006, HoyleCohen has completed three mergers prior to this transaction, and has also taken advantage of many of our value-added programs to build and strengthen their business while enhancing the services they offer to their clients. This transaction is another example of how we add value to our partners through our M&A expertise and extensive network of relationships in the industry. We are able to find attractive and like-minded merger candidates that help our partners

accelerate their growth and join forces with teams that will work well together in meeting client goals."

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 HoyleCohen, LLC

HoyleCohen, LLC is an independent investment adviser headquartered in San Diego, CA. The firm provides wealth management, investment management and financial planning services to individuals and families seeking impartial advice and long-term financial security. For more information about HoyleCohen, please visit www.hoylecohen.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.

Investor and Media Contacts

Tina Madon
Senior Vice President
Head of Investor Relations & Corporate Communications
Focus Financial Partners
P: +1-646-813-2909
tmadon@focuspartners.com

Charlie Arestia
Vice President
Investor Relations & Corporate Communications
Focus Financial Partners
P: +1-646-560-3999
carestia@focuspartners.com

SOURCE: Focus Financial Partners

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