



Cassaday & Company, Inc., a Premier Independent Wealth Manager With a Substantial Presence in the D.C. Metro Area, to Join Focus as a New Partner Firm

NEW YORK, NY / ACCESSWIRE / December 8, 2021 / [Focus Financial Partners Inc.](#) (NASDAQ:FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that [Cassaday & Company, Inc.](#), a registered investment adviser based in McLean, Virginia, has entered into a definitive agreement to join the Focus partnership. The transaction is expected to close in the fourth quarter of 2021, subject to customary closing conditions.

Founded in 1993 by Stephan Cassaday, Cassaday & Company, Inc. provides comprehensive investment advisory, financial planning and wealth management services to high net worth individuals and families. Cassaday & Company, Inc. is highly regarded for the caliber of its experienced and tenured team of professionals who work collaboratively to help clients meet the challenges of managing their wealth. The firm is known for its holistic wealth management and planning, which integrates the totality of the financial planning processes. Cassaday & Company, Inc. will continue to be led by Steve as Chairman and CEO, and Allison Felix as President & COO, together with the firm's current leadership team.

"Cassaday & Company, Inc. was founded to provide independent advice and to support all aspects of a client's financial life and future," said Steve Cassaday. "Our strategic partnership with Focus will allow us to further enhance the level of service we are providing to our clients, while also providing a path to partnership for our next generation of talented leaders. Becoming a Focus partner firm enables us to maintain our entrepreneurial culture and operational autonomy while giving us access to resources that will help us provide an even greater level of service and attention for our clients. We will also enjoy the synergies of joining a partnership of nearly 80 like-minded firms who are each industry leaders in their own right. Our partnership with these outstanding professionals is the right decision at the right time for our clients and colleagues."

"We are delighted to partner with a firm of Cassaday & Company, Inc.'s reputation," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Steve and the rest of his team have created a distinctive client centered culture, complimented by internal processes and differentiated approaches to wealth management. The firm has received impressive national and regional recognition as an industry leader. Cassaday & Company, Inc. will be our first partner based in the important Northern Virginia wealth market, further expanding our presence in Virginia and the Mid-Atlantic. Cassaday & Company Inc.'s commitment to always do the right thing for its clients makes it a perfect fit with our other outstanding and entrepreneurial Focus partner firms."

Park Sutton Advisors served as financial advisor to Cassaday & Company, Inc. for this transaction.

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 focusfinancialpartners.com.

About Cassaday & Company, Inc.

Cassaday & Company, Inc. is a registered investment advisor based in McLean, Virginia. The firm has a full-scale wealth management offering and provides investment management, financial planning, retirement planning, tax planning, death and disability planning, estate planning, insurance solutions, income and asset protection and life transition services to its clients. For more about Cassaday & Co., please visit cassaday.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, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, 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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