Executive Wealth Group to Join Focus Partner Firm Bordeaux Wealth Advisors, Expanding Bordeaux's Niche of Advising Executives in the Aerospace Industry

New York, NY – March 21, 2024 – Focus Financial Partners Inc. ("Focus" or the "Company"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which Executive Wealth Group, LLC, a registered investment adviser based in Kirkland, WA, will join Focus partner firm Bordeaux Wealth Advisors ("Bordeaux"). This transaction is expected to close in the second quarter of 2024, subject to customary closing conditions.

Executive Wealth Group, led by Sam Maxwell, provides customized financial planning and investment management services to senior corporate executives and their families, with a focus on serving executives in the aerospace industry. The transaction will increase Bordeaux's presence and market leadership in the Seattle market and enhance its ability to serve executives in the aerospace industry. Executive Wealth Group's clients will gain access to Bordeaux's investment platform, tax and wealth planning capabilities, experienced team of professionals and robust operational infrastructure. The key principals of both firms have been advising senior aerospace industry executives in the Seattle area for over 50 years combined, and this joining of forces will deepen their combined bench of talent and resources.

"We pride ourselves on our dedication to providing exceptional service and personalized attention to each of our clients," shared Sam Maxwell, CEO and Founder of Executive Wealth Group. "We are always looking for new ways to make a positive impact in our clients' lives. Partnering with Bordeaux solidifies a succession solution for our clients, and it will also allow us to draw from the substantial resources, top notch talent and knowledge of a great firm. This will enable us to continue to provide our clients with outstanding, personalized service for years to come. We are thrilled for this next chapter as part of the Bordeaux team."

"Sam has built a fantastic practice at Executive Wealth Group. He is an exceptional and talented advisor, and he shares our passion for providing the very best advice and service, and always doing what is right for each and every client," said Tom Myers, Managing Partner and CEO at Bordeaux. "We look forward to working together with Sam and his team at Executive Wealth Group. Their experience and commitment to client service make them an ideal fit for Bordeaux."

“We are excited that Executive Wealth Group is joining Bordeaux,” said Pradeep Jayaraman, Managing Director and Co-Head of Partnerships and Business Development for Focus. “The addition of the Executive Wealth Group team will build upon Bordeaux’s significant Seattle presence and enable them to serve more corporate executives in the Seattle area. This transaction also illustrates Focus’s commitment to adding value to our partners through our M&A expertise as they broaden their capabilities 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 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 Bordeaux Wealth Advisors LLC

Bordeaux Wealth Advisors LLC is an independent investment adviser with offices in Silicon Valley (Menlo Park, CA) and Seattle (Kirkland, WA). Bordeaux provides wealth management services that include discretionary and non-discretionary investment advisory services, comprehensive and customized financial planning, tax planning, equity compensation planning, estate and wealth transfer planning for high-net-worth and ultra high net worth individuals and families.

For more information about Bordeaux, please visit bordeauxwealthadvisors.com.

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