FOCUS PARTNER FIRM THE COLONY GROUP EXPANDS TO 10 OFFICES WITH MERGERS IN THE D.C. AND NY METRO AREAS

New York, NY – January 8, 2018 – Focus Financial Partners (‘Focus’), a leading international partnership of independent, fiduciary wealth management firms, today announced that The Colony Group (‘Colony’), a registered investment advisory firm with clients across the country, completed mergers with Bridgewater Wealth & Financial Management (‘Bridgewater Wealth’) and Blue Water Advisors (‘BWA’). Through these transactions, Colony has expanded its presence to encompass 10 offices employing approximately 140 professionals. Colony has completed seven strategic transactions since joining the Focus partnership in 2011, added eight offices, and more than doubled its number of employees.

Colony and Bridgewater Wealth share a number of key client segments, including athletes, entertainers, entrepreneurs, professionals and multi-generational families. Bridgewater Wealth was founded in 1996 by Ron Rubin and has offices in Bethesda and Easton, Maryland. Since joining the Focus partnership in 2009, Bridgewater has grown its client offerings significantly through three strategic transactions and organic programs such as Her Wealth®, which was launched in 2016 to empower women with the financial confidence and resources needed to take control of their money and wealth. Colony will continue to invest in and support the growth of Her Wealth®.

“As partner firms of Focus, the Colony and Bridgewater Wealth teams have been sharing our ideas for years. We hold similar values and work diligently to provide high-quality client services,” Rubin said. “I now look forward to combining the talents of our successful and innovative firms as we strive to deliver what we believe is the best set of solutions and cultural experience for our clients,” added Rubin, now Vice-Chairman and Managing Director, Mid-Atlantic Region, of The Colony Group.

Based on Long Island, New York, BWA was founded by Max Haspel in 2001 and became a registered investment adviser in 2014. The BWA team specializes in serving successful business owners, corporate executives and women in transition through a highly defined process of close collaboration with clients and other trusted professionals.

“We carefully considered a range of attractive options, potential structures and how we could best position ourselves to deliver the high-touch, outcome-oriented experience our clients expect and deserve. I believe that the combination with Colony maximizes the potential to unleash the best version of what we can be for our clients. It will allow us to shift operational, management and compliance responsibilities, and focus on the highest and best use of our time. I’m excited for our talented team to concentrate its energy even more efficiently and effectively on client advice and service, investment- and wealth planning-research, and growth,” said Max Haspel, now Managing Director and Senior Wealth Advisor of The Colony Group.

“Our conversations with prospective merger partners always revolve around a singular question, ‘How does this improve our firm and what we offer our clients?’” said Michael Nathanson, Colony’s Chairman & CEO. “We have found time and again that our merger partners add enormous benefits, starting with talent and specialized expertise, and including deeper investment, technological, operational, and other capabilities. We expect Bridgewater Wealth and BWA to enhance how we serve our clients.”

“The Colony team joined Focus just over six years ago on a mission in pursuit of an extraordinary vision to be recognized as a leading financial advisory firm. Focus provides the support, financial capital and resources to help them realize their aspirations,” said Rudy Adolf, Founder and CEO of Focus. “Colony has the right vision, team and model, and that, coupled with our resources will propel it to the next level of growth.”

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About Focus Financial Partners

Focus Financial Partners is a leading partnership of independent, fiduciary wealth management firms. Focus provides superior access to best practices, resources, and continuity planning for its partner firms who serve individuals, families, employers and institutions with wealth management, benefits consulting and investment consulting services. Focus partner firms maintain their operational independence, while they benefit from the synergies, scale, economics and best practices of a market leader to achieve their business objectives. For more information about Focus Financial Partners, please visit www.focusfinancialpartners.com.

Media Contact:

Daijing Lin

Phone: +1 646-775-6412
dlin@focuspartners.com