

Derby and Company to Join Focus Partner Firm The Colony Group, Further Expanding Colony's New England Presence

NEW YORK, NY / ACCESSWIRE / November 22, 2021 / [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 [Derby and Company, Inc.](#) ("Derby"), a registered investment adviser based in Newton, MA, will join Focus partner firm The Colony Group, LLC ("Colony"). The transaction is expected to close later this year, subject to customary closing conditions.

Founded in 1987, Derby provides investment management and financial planning services to high-net-worth individuals and families. Led by Mark and Jonathan Derby, the team delivers wealth management services and investment expertise centered on creating individualized portfolios comprised of ETFs, mutual funds, bonds and private investments. Derby will help Colony increase its presence in New England through the addition of a talented team with deep expertise. Colony will offer Derby's clients enhanced support and access to a broader range of wealth management services, while also allowing the Derby team to leverage Colony's operational infrastructure. Mark and Jon will join Colony as Principals and Senior Wealth Advisors.

"Mark and Jon lead a successful firm and a highly impressive team, and we are excited to have them join The Colony Group. They have built a strong client base with close relationships, and we are looking forward this partnership enhancing our combined business," said Michael Nathanson, Chair and CEO of Colony.

"We are delighted that the Derby team will be joining Colony, marking Focus' 23rd merger on behalf of its partner firms year-to-date, and Colony's fifth merger with a top-tier firm this year," said Rudy Adolf, Founder, CEO and Chairman of Focus. "The addition of Derby will further expand Colony's impressive market share in the New England wealth management market. Colony consistently seeks to add talented teams to their deep bench of advisors and investment personnel, and the Derby team will be an excellent addition."

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 The Colony Group, LLC

The Colony Group, LLC ("Colony") is an independent, fee-only wealth and business management firm registered with the Securities and Exchange Commission ("SEC") with locations in California, Colorado, Connecticut, Florida, Maryland, Massachusetts, New Hampshire, New Jersey, New York and Virginia. Registration with the SEC does not imply a certain level of skill or training and does not imply that the SEC has endorsed or approved the qualifications of Colony or its representatives.

With origins dating back to 1986, Colony provides individuals and families, executives, business owners, entrepreneurs, athletes and entertainers, institutions and non-profit organizations with deep expertise that goes beyond investment management and can encompass tax, estate, retirement and philanthropic planning, asset allocation and sustainable investing solutions, family office services, business management services, divorce and dispute resolution services, and life-enrichment services through Curated by ColonyTM. For more information about Colony, please visit www.thecolonygroup.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

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