



Henry + Horne Wealth Management Will Join Focus Partner Firm InterOcean Capital Group, Strengthening InterOcean's Presence in the Southwest

NEW YORK, NY / ACCESSWIRE / April 30, 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 Wealth Management, LLC, d/b/a Henry+Horne Wealth Management ("Henry+Horne WM"), a registered investment adviser located in Scottsdale, Arizona, will join Focus partner firm InterOcean Capital Group, LLC ("InterOcean"). This transaction is expected to close in the second quarter of this year, subject to customary closing conditions.

Founded in 2005, Henry+Horne WM offers personalized investment advice and integrated wealth management to high net worth and ultra-high net worth individuals and families, and also serves businesses and other institutions. Henry+Horne WM is led by its founder, Michael Carlin, who has more than 25 years of experience in the industry.

As a result of the transaction, Henry+Horne WM will gain access to the investment management and financial planning strengths of InterOcean. InterOcean will gain a talented team with deep experience in wealth and risk management for individuals and families, as well as expertise in establishing and maintaining retirement plans and helping clients going through life transitions. InterOcean's resources will enable the Henry+Horne WM team to continue expanding in the attractive Southwest market and serve more clients with differentiated investment and planning offerings.

"After time spent with the InterOcean team, I could not be more excited about what this transaction offers our clients and our organization," said Michael J. Carlin, Founder and President of Henry+Horne Wealth Management. "Our firms share a client-first philosophy, and we look forward to working together to deliver superior value to our clients. Furthermore, in combination our firms create an RIA that will provide strong investment management and financial planning capabilities that is attractive to both our employees and clients while we continue to expand our presence across the Southwest."

InterOcean's Co-Founder and President, Mark Carr, shared the same sentiment. "We are extremely impressed with Michael and his team, and thrilled that they are joining InterOcean. The addition will enable us to expand our geographic reach into a very attractive region, while also increasing our offerings to clients. We are excited to partner with a firm that shares our focus on the fiduciary and client-first approach to wealth management."

"We are very pleased that Henry+Horne WM will be joining InterOcean," said Rudy Adolf, Co-Founder, CEO and Chairman of Focus. "Since becoming a Focus partner firm in 2020, InterOcean has taken advantage of our scale and industry presence to expand their business nationally, first through their new office in Nashville and now by joining forces with the talented Henry+Horne

WM team in Scottsdale. This transaction is another example of how we add value to our partners through our M&A expertise and extensive network of relationships. We are able to find attractive and like-minded merger candidates that help our partners to 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 InterOcean Capital Group, LLC

InterOcean Capital Group, LLC is an independent investment adviser with offices in Chicago, IL and Nashville, TN. The firm provides personalized asset management and financial planning services to high net worth individuals, families, and institutions and has expertise in the individual selection of equities, fixed income securities and alternative investments. For more information about InterOcean, please visit www.iofinance.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

View source version on [accesswire.com](https://www.accesswire.com):

<https://www.accesswire.com/699599/Henry-Horne-Wealth-Management-Will-Join-Focus-Partner-Firm-InterOcean-Capital-Group-Strengthening-InterOceans-Presence-in-the-Southwest>