FOCUS FINANCIAL STARTS YEAR WITH THREE STRATEGIC TRANSACTIONS

New York, NY – Jan 22, 2018 – Focus Financial Partners (‘Focus’), a leading international partnership of independent, fiduciary wealth management firms, today announced that it has closed strategic transactions for three partner firms: Buckingham Strategic Wealth (‘Buckingham’), The Colony Group (‘Colony’) and Strategic Wealth Partners (‘Strategic Wealth’).

Focus closed the following transactions on January 1, 2018.

- **Buckingham Strategic Wealth**: Stevens Wealth Management, an all-women team founded by Sue Stevens, merged with Buckingham. Based in Deerfield, Illinois, Stevens Wealth provides comprehensive financial planning services and investment management to clients across the region. The merger marks Buckingham’s first entry into the greater Chicago market.
- **The Colony Group**: Blue Water Advisors, an independent wealth management firm based in Long Island, New York, has merged with The Colony Group. Blue Water Advisors was founded by Max Haspel in 2001 and became a registered investment adviser in 2014. Their 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.
- **Strategic Wealth Partners**: William (‘Bill’) Perry, former President and Founder of Park Place Capital Management, joins Strategic Wealth as a Senior Wealth Advisor. As part of the Strategic Wealth team, Mr. Perry, along with his staff, will continue to provide portfolio management consulting and comprehensive financial planning services to institutions, retirement plans, foundations and high-net-worth clients. This transaction allows Strategic Wealth to expand its footprint to the attractive Milwaukee market, complementing its strong presence in the Chicago area.

“Our goal at Focus is to help entrepreneurs realize their ambitions, which includes connecting them with other like-minded individuals to drive next-level growth and success,” said Rudy Adolf, founder and CEO of Focus. “To help our partner firms increase their geographic presence and expand their services, Focus provides access to capital and extensive M&A expertise.”

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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.

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