



Samson Wealth Management Group to Join Focus Partner Firm XML Financial Group, Expanding XML's Presence in the Mid-Atlantic Region

NEW YORK, NY / ACCESSWIRE / May 18, 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 [Samson Wealth Management Group](#) ("Samson Wealth Management"), a wealth management practice in Fort Washington, Pennsylvania, will join Rockville, Maryland-based Focus partner firm [XML Financial Group](#) ("XML"). The transaction is expected to close in the third quarter of 2022, subject to customary closing conditions.

Mark Samson founded Samson Wealth Management in 2012 to provide comprehensive wealth and investment management services to high net worth individuals and families located across the country. Mark and his team follow a customized, holistic approach to help their clients grow, preserve and enjoy their wealth. Mark has been named to the Forbes [Best-In-State Wealth Advisors](#) list each year since its inception in 2018 through 2022. This transaction will expand the infrastructure and support resources for both Samson Wealth Management and XML, positioning the combined firm for future growth opportunities. The addition of Samson Wealth Management will also expand XML's presence within the Mid-Atlantic region. Mark will join XML's leadership team.

"Mark and his team take a client-first approach to wealth management that aligns well with our philosophy at XML," said Brett Bernstein, CEO and Co-Founder of XML. "We are thrilled to welcome them and are excited to expand XML through our combined firm. We look forward to this deal closing in the summer and to many years of continued success."

"We are pleased that the Samson Wealth Management team will be joining XML in Focus' seventh merger on behalf of its partner firms year-to-date," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This transaction will help XML expand and scale its business, while further diversifying its client base. Additionally, this is the third transaction for XML since joining Focus, another demonstration of how we add value to our partner firms through strategic M&A. The business expansion our partners achieve through mergers is a powerful catalyst to the overall growth of our partnership."

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 XML Financial Group

XML Financial Group ("XML") is an independent wealth and investment management firm headquartered in Rockville, Maryland. XML offers a suite of wealth and investment management services to high-net-worth individuals, businesses and families located across the country. For more information about XML, please visit www.xmlfg.com.

About the Forbes Best-In-State Wealth Advisors List

The Forbes ranking of Best-In-State Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, gained through telephone, virtual and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

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, including the impact of the conflict in Ukraine, 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.

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