



18 Focus Partner Firms Named to the Inaugural Forbes/SHOOK 2022 List of Top 100 RIA Firms

NEW YORK, NY / ACCESSWIRE / October 26, 2022 / [Focus Financial Partners Inc.](#)

(NASDAQ:FOCS) ("Focus"), a leading partnership of fiduciary wealth management firms, announced today that eighteen of its partner firms were named to the inaugural Forbes/SHOOK 2022 List of 100 Top RIA Firms. This list is based on a national survey conducted by SHOOK Research, including qualitative and quantitative factors such as telephone and in-person interviews with the firms being reviewed.

In alphabetical order, these firms are:

- Bartlett Wealth Management
- Bordeaux Wealth Advisors
- Buckingham Strategic Wealth
- Cassaday & Company
- Crestwood Advisors
- Douglas C. Lane & Associates
- Edge Capital Group
- Fort Pitt Capital Group
- Gratus Capital
- GW & Wade
- HoyleCohen
- Icon Wealth Partners
- Joel Isaacson & Co.
- Lake Street Advisors
- Merriman Wealth Management
- Telemus Capital
- Williams Jones Wealth Management
- XML Financial Group

"We are honored that Focus partner firms comprise nearly 20% of the Forbes/SHOOK 2022 Top 100 RIA List," said Rudy Adolf, Founder, CEO and Chairman of Focus. "The achievement of these firms reflects the strength of the entrepreneurial businesses their founders have built and those businesses' long history of thoughtful client service across market cycles. Focus is proud to partner with these industry leaders and accelerate their success through our growth capital and suite of value-added programs. Our value proposition remains distinctive for entrepreneurial leaders who are ready to scale their businesses while maintaining exceptional standards for client service."

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 focusfinancialpartners.com.

About the Forbes/SHOOK 2022 List of Top 100 RIA Firms

The Forbes rankings are based on data compiled from a SHOOK Research survey including both qualitative and quantitative results, as well as telephone and in-person interviews with the firms being reviewed. Basic requirements were instituted to limit the number of applications. Rankings were determined based upon an algorithm weighing these qualitative and quantitative results.

Quantitative metrics included revenue growth, assets under management and client retention rates. Portfolio performance was not a factor in the rankings due to varying client objectives.

SHOOK Research also weighed a wide range of qualitative factors, including compliance records, breadth of services offered, advisor credentials and community involvement.

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.

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