

# FOCUS PARTNER MERRIMAN EXPANDS PRESENCE IN OREGON THROUGH SECOND MERGER

New York, NY – July 10, 2017 – Focus Financial Partners ('Focus'), a leading international partnership of independent, fiduciary wealth management firms, today announced that its Seattle-headquartered partner firm Merriman Wealth Management ('Merriman') has joined forces with Carter & Carter Wealth Strategies ('Carter & Carter'), an independent registered investment advisory firm based in Eugene, Oregon. This is the second merger Merriman has closed since early 2016 as the firm continues to strengthen its position as one of the leading wealth management firms in the Pacific Northwest.

Carter & Carter, led by Charlene Carter and Jenny Hector, offers comprehensive wealth management services. Ms. Carter and Ms. Hector, along with their team of five, will continue to serve their clients out of the Eugene office following the transaction with Merriman.

"Our entire business is built on our relationships with clients. At all times, our clients are our top priority. We are pleased that Merriman shares this same guiding principle," said Charlene Carter, President at Carter & Carter.

"Combining forces with a firm like Merriman is an exciting step forward for our firm."

"We are excited to welcome the Carter & Carter team. Together, we will draw on our decades of experience in wealth management to enhance our combined client service offering," said Jeremy Burger, CEO of Merriman.

"Focus has played an instrumental role in our expansion throughout the Pacific Northwest and is the ideal partner to help us achieve our vision of becoming the preeminent wealth management firm in the Pacific Northwest."

"Merriman's rapid growth is a reflection of the team's culture and values – open, entrepreneurial and always eager to expand. The success of Merriman's mergers also exemplifies Focus' M&A approach – connecting like-minded firms. We expect continued excellence from Merriman," said Rudy Adolf, Founder and CEO at Focus.

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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](http://www.focusfinancialpartners.com).

### **About Merriman Wealth Management**

Founded in 1983, Merriman Wealth Management is a Seattle-based wealth management firm. The firm emphasizes a comprehensive wealth management approach that incorporates financial planning, retirement planning, insurance, estate/wealth transfer planning, income tax planning and charitable giving strategies supported by their core investment management offering. Merriman currently employs a total of 44 staff, including 15 principals, and serves approximately 2,000 clients. For more information, please visit [www.Merriman.com](http://www.Merriman.com).

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