



# Focus Partners With CAIS to Provide a Customized Alternative Investments Platform to all Firms in the Focus Partnership

**NEW YORK, NY / ACCESSWIRE / February 10, 2022 / [Focus Financial Partners Inc.](#)** (NASDAQ:FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms and [CAIS Capital LLC](#) ("CAIS") a leading alternative investments platform, today announced the launch of a customized alternative investments platform (the "CAIS Platform" or the "Platform") designed to meet the unique needs of the firms in the Focus partnership. The Platform will offer access to an array of alternative investments, as well as advisor education, independent due diligence and end-to-end digitized transaction processing and third-party reporting integrations.

"We are excited to partner with CAIS to provide our partner firms with an innovative approach to accessing alternative investments," said Rajini Kodialam, Co-Founder and Chief Operating Officer of Focus. "The CAIS Platform is customized to meet the needs of our partners. It will deliver a curated selection of investment options and allow our partners to work with CAIS to add additional funds to the Platform. Our partner firms will also benefit from the digitized investment selection, transaction processing and integrated reporting with independent custodians and reporting firms, creating significant operating efficiencies around their investments in alternatives. Our partnership with CAIS is another example of the caliber of value-added services we offer our partners. Leveraging Focus' unique scale and reach enables them to better serve their clients."

The CAIS Platform will allow Focus partner firms to evaluate a range of alternative investment strategies on behalf of their clients, including hedge funds, private equity, private credit, real estate, digital assets and structured notes. CAIS will also launch and operate proprietary feeder funds and multi-manager funds to meet the unique needs of Focus partner firms. These customized fund solutions will only be available through the CAIS Platform. Additionally, Focus partner firms will be able to add their own sourced third-party funds to the Platform and benefit from centralized monitoring, transacting and reporting.

"The CAIS Platform will make alternative investment strategies seamlessly available, providing a significant benefit to Focus partner firms and further strengthening the power of the partnership," said Tony Abbiati, CEO of SCS Financial.

"At Colony, we are deeply focused on identifying managers that we believe are well-positioned to capture private market opportunities. Having CAIS create and operationalize low-cost, multi-manager fund structures will enable us to make these strategies available to our clients in a timely and highly efficient manner," said Michael Nathanson, Chair and CEO of The Colony Group.

CAIS will also provide CAIS IQ to the Focus partnership, an industry-leading learning system to help advisors improve client outcomes. CAIS IQ content will be tailored to meet the unique needs of each Focus partner firm.

"For over a decade, CAIS has worked closely with Focus partner firms and understands their alternative investments needs. This new, customized Platform will enable every partner firm to offer

its clients alternative investments as part of a diversified investment strategy," said Matt Brown, Founder and CEO of CAIS. "The Platform will also deliver a comprehensive source of advisor education on alternative investments, which are a complex and rapidly evolving asset class."

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

### **About CAIS**

CAIS is a leading alternative investment platform for financial advisors who seek improved access to, and education about, alternative investment funds and products. CAIS provides financial advisors with a broad selection of alternative investment strategies, including hedge funds, private equity, private credit, real estate, digital assets, and structured notes, allowing them to capitalize on opportunities and/or withstand ever-changing markets. CAIS also provides an industry-leading learning system, CAIS IQ, to help advisors learn faster, remember longer, and improve client outcomes.

All funds listed on CAIS undergo Mercer's independent due diligence and ongoing monitoring. Mercer diligence reports and fund ratings are available to advisors on the CAIS password-protected platform. CAIS streamlines the end-to-end transaction process through digital subscriptions and integrated reporting with Fidelity, Schwab, and Pershing, which make investing in alternatives simple.

Founded in 2009, CAIS, a fintech leader, is empowering over 4,800+ unique advisor firms/teams who oversee more than \$2+ trillion in network assets. Since its inception, CAIS has facilitated over \$15+ billion in transaction volume as the first truly open marketplace where financial advisors and asset managers engage and transact directly on a massive scale. CAIS has offices in New York, Los Angeles, Austin, and San Francisco. For more information about CAIS, please visit [www.caigroup.com](http://www.caigroup.com).

Securities offered through CAIS Capital LLC, member [FINRA](#), [SIPC](#).

### **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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