

# Stellar Capital Management To Join Focus Partner Firm HoyleCohen

**NEW YORK, NY / ACCESSWIRE / July 30, 2020** / 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 Stellar Capital Management, LLC ("Stellar"), a registered investment adviser in Phoenix, Arizona, will join Focus partner firm HoyleCohen, LLC ("HoyleCohen"), based in San Diego, California. This transaction is expected to close in the third quarter of 2020, subject to customary closing conditions.

Stellar was co-founded in 2000 by Stephen Taddie and Richard Stern to provide sophisticated investment management services to high net worth individuals, and more recently 401(k) plan sponsors, across Arizona and on the West Coast. Steve and his team will leverage HoyleCohen's scale and professional resources to provide broader investment management capabilities and other service offerings to their clients.

"Our team has focused on delivering strong investment portfolio management for the last twenty years," said Stephen Taddie, Managing Partner of Stellar. "Over time, client needs have evolved to include services that we did not offer internally. Combining Stellar's core strength with HoyleCohen's breadth of services is a well-timed, prudent decision that addresses those expanding needs and deepens the bench of professional talent available to our clients."

"It is a privilege to have Steve Taddie and the talented Stellar team join HoyleCohen," said Mark Delfino, Managing Director and Chief Executive Officer of HoyleCohen. "Our firms are like-minded and share a passion for putting clients' interests first. Stellar has deep investment management expertise that complements our core capabilities. This combination will allow us to offer an even more robust set of wealth management services to all our clients."

"We are thrilled that Steve and the Stellar team will be joining HoyleCohen," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Stellar's expertise in investment management, combined with the breadth of HoyleCohen's platform, will unlock powerful benefits for the clients of both firms. Transactions like this further reinforce the value we offer to our partner firms as they benefit from our scale, intellectual capital and our leading M&A capabilities."

## About Focus Financial Partners Inc.

Focus Financial Partners Inc. (NASDAQ:FOCS) 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 HoyleCohen, LLC

With offices in San Diego, Santa Monica and Sacramento, California, HoyleCohen offers comprehensive wealth management services, including investment management as well as retirement, estate, tax, insurance and legacy planning. HoyleCohen's holistic approach and deep expertise help clients make well-informed decisions and address a myriad of wealth-related needs

throughout their lifetimes. HoyleCohen's investment platform offers clients unique combinations of strategies depending on their circumstances and preferences. For more information, please visit [www.hoylecohen.com](http://www.hoylecohen.com).

### **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, without limitation, uncertainty surrounding the current COVID-19 pandemic, 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.

### **Investor and Media Contact**

Tina Madon  
Senior Vice President  
Head of Investor Relations & Corporate Communications  
Focus Financial Partners  
P: +1-646-813-2909  
[tmadon@focuspartners.com](mailto:tmadon@focuspartners.com)

**SOURCE:** Focus Financial Partners Inc.

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