Former Merrill Lynch Advisors Launch Pasadena Private Wealth Through Focus Financial Partners

New York, NY – May 21, 2018 – Focus Financial Partners (‘Focus’), a leading partnership of independent, fiduciary wealth management firms, today announced the formation of Pasadena Private Wealth, an independent wealth management firm based in Pasadena, California. The firm is led by former Merrill Lynch advisors Iain Whyte, Simon Holford and Bryan Muth. Pasadena Private Wealth was launched with the help of Focus Independence, a division of Focus that helps advisory teams successfully launch their independent wealth management businesses.

The founders of Pasadena Private Wealth met during their time at Merrill Lynch, where they formed Whyte Holford & Associates in 2003. This group later grew to an 11-person team focused on helping entrepreneurs, C-suite executives and their families navigate the landscape of preserving and growing their personal net worth. Prior to Merrill Lynch, Mr. Whyte, Mr. Holford and Mr. Muth held senior executive positions in corporate and commercial banking, M&A, wealth management and pension consulting.

At their new firm, Mr. Whyte will serve as Chairman, Mr. Holford as CEO and Mr. Muth as Director of Retirement Plans, in addition to their responsibilities as Managing Partners. They will be joined by 4 professionals in client services. Collectively, the entire team has over 110 years of combined financial industry experience and deep knowledge in the fields of portfolio management, commercial and residential lending and corporate retirement consulting. The new firm will be built across three core dimensions of wealth management – investment portfolios, real estate holdings and business ventures – and will continue to serve high net worth families with ties to California.

“Launching an independent RIA has been on our mind for a while. The fiduciary standard is what we want to hold ourselves to and becoming independent will fully allow us to serve our clients’ best interest. When we met Focus, it was clear they were the right partner for us on this journey,” said Iain Whyte, Chairman and Managing Partner at Pasadena Private

Wealth. “With access to Focus’ capital and resources, we hope to continue to strengthen our business and further expand our service offerings.”

“Striving for excellence in every facet of the business is a philosophy Pasadena Private Wealth and Focus share. The team’s dedication to clients and drive for growth make them a natural fit for us,” said Chris Dupuy, President of Focus Independence. “Focus Independence has grown over the years thanks to the high caliber of firms we have attracted. Supporting the growth of these firms while ensuring their autonomy is the key principle that will never change at Focus.”

###

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 and institutions with wealth investment and family office 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

About Pasadena Private Wealth

Based in Pasadena, California, Pasadena Private Wealth is an independent registered investment adviser. The firm offers comprehensive, fiduciary wealth management services for business owners, entrepreneurs or C-suite executives, with a focus on investment portfolios, real estate holdings and business ventures. For more information, please visit www.pasadenaprivatewealth.com

Media Contact:

Daijing Lin

Phone: +1 646-775-6412
dlin@focuspartners.com