



## The Colony Group to Join Focus Financial Partners

- Focus Expands RIA Network; Grows Assets to \$45 billion
- The Colony Group to become a Focus Partner October 1st

NEW YORK – September 20, 2011 – Focus Financial Partners, LLC (“Focus”), the leading partnership of independent wealth management firms, today announced its investment in The Colony Group (“Colony”), a Boston-based registered investment advisory firm (RIA) with approximately \$1.3 billion in assets under management. This is Focus’ fourth transaction in 2011; the partnership will become effective October 1, 2011. With its investment, Focus will grow to \$45 billion in assets.

Colony and its senior executives have received many accolades, including the prestigious “Best-in-Business IMPACT Award<sup>®</sup>” given at the Schwab IMPACT<sup>®</sup> 2010 Conference. The firm is consistently ranked nationally among the top independent wealth advisors by prominent industry rankings including *Barron’s*, *Forbes* and *Financial Advisor Magazine*, among others. Most recently, Michael Nathanson, CEO and President of Colony, marked his fourth appearance on *Barron’s* annual list of the “Top 100 Independent Wealth Advisors” for 2011.

In addition to the firm’s Boston headquarters, Colony has established offices in Naples and West Palm Beach, Florida, as well as Washington D.C. With this investment, and by leveraging Focus’ practice and business management expertise, Colony plans to continue to aggressively grow the firm and continue its success into other regions.

Rudy Adolf, Founder and CEO of Focus Financial Partners, said, “Colony is simply one of the best independent investment advisors in the market and we are thrilled to be partnering with them. We have known Michael and his team for several years, and have been consistently impressed by their ability to attract assets and grow their business. Moreover, the addition of Colony further strengthens our unique partner model and we look forward to adding more high-caliber independent, fiduciary-minded advisors in the months and years to come.”

“Over the years we’ve had tremendous success serving our clients, growing our client base and expanding into new and exciting markets,” said Mr. Nathanson. “We believe it is an opportune time to partner with Focus, which has the proven ability to help firms like ours move forward into

their next evolution; with Focus' support we will be able to go farther faster, allowing us to realize our full growth potential.”

With over 40 employees on staff, Colony provides comprehensive wealth management services, including investment management, tax planning and preparation, as well as corporate advisory services. The firm serves over 800 clients including high-net worth individuals, families, and institutions.

Seeing a need in the marketplace for fee-only, personalized investment advice, Kirby Hamilton founded Colony in 1986 with the mission of providing customized, objective financial services. As part of a long planned business transition, Mr. Hamilton will step down as Chairman following the close of the transaction. Going forward the Colony management team will consist of a three-member board including Mr. Nathanson as Chairman, Stephen Sadler, President of Colony Wealth Management and Elisabeth Talbot, Executive Director and Chief Market Strategist.

Michael Paley, Senior Vice President at Focus, said, “With over 25 years in the wealth advisory business, Colony is one of the best managed RIAs in the industry, and we are very pleased to welcome them into the Focus partnership. We look forward to working alongside the stellar team at Colony to further scale the firm’s already exceptional wealth management services.”

#### **About Focus Financial Partners**

Founded in 2006, Focus Financial Partners, LLC, is the leading international partnership of independent, fiduciary wealth management firms. With over \$45 billion in assets and over 750 employees, Focus' Partners provide wealth management, benefit and investment consulting services to individuals, families, employers and institutions. Clients benefit from Focus' Partners independence, unrivaled access and continuity. Focus principals maintain their entrepreneurial independence, benefit from the synergies, scale, economics and best practices of the market leader, and achieve an eventual, smooth ownership transition. For more information, please visit [www.focusfinancialpartners.com](http://www.focusfinancialpartners.com).

#### **About The Colony Group**

Since its founding in 1986, The Colony Group, LLC has provided investment, wealth management, and other financial advisory services to high net worth individuals, corporate clients, profit-sharing plans, charitable organizations, and other institutions. Managed by a group of financial professionals dedicated to providing objective advice and exceptional service to clients, The Colony Group has approximately \$1.3 billion in assets under management, with offices in Boston, Naples and West Palm Beach, Florida, as well as Washington D.C. Additional information about the firm can be found on the company’s website at [www.thecolonygroup.com](http://www.thecolonygroup.com).

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