Experience is everything

FOCUS PARTNERS | WEALTH

Picture it: peace of mind.

Imagine having the freedom to focus on the things that you enjoy.

We are passionate about helping you with every aspect of your financial life.

When you work with a Focus Partners Wealth advisor:

You achieve **clarity**.

You can live your life in the "now," and when you think about the future you can have the confidence you'll end up where you want to be.

You feel **empowered**.

Know your financial strategy is supported by comprehensive advisory resources tailored to achieve your ambitions and life vision.

You gain a **partner**.

Work with a fiduciary advisor who puts your interests first and gets to the core of your values and goals to collaborate as life happens.

We are Focus Partners Wealth, a growing community of advisors, financial professionals, and people like you who believe that when our lives are guided by a sound plan, we can achieve great things.

The essence of our approach to serving you is to always act in your best interests.

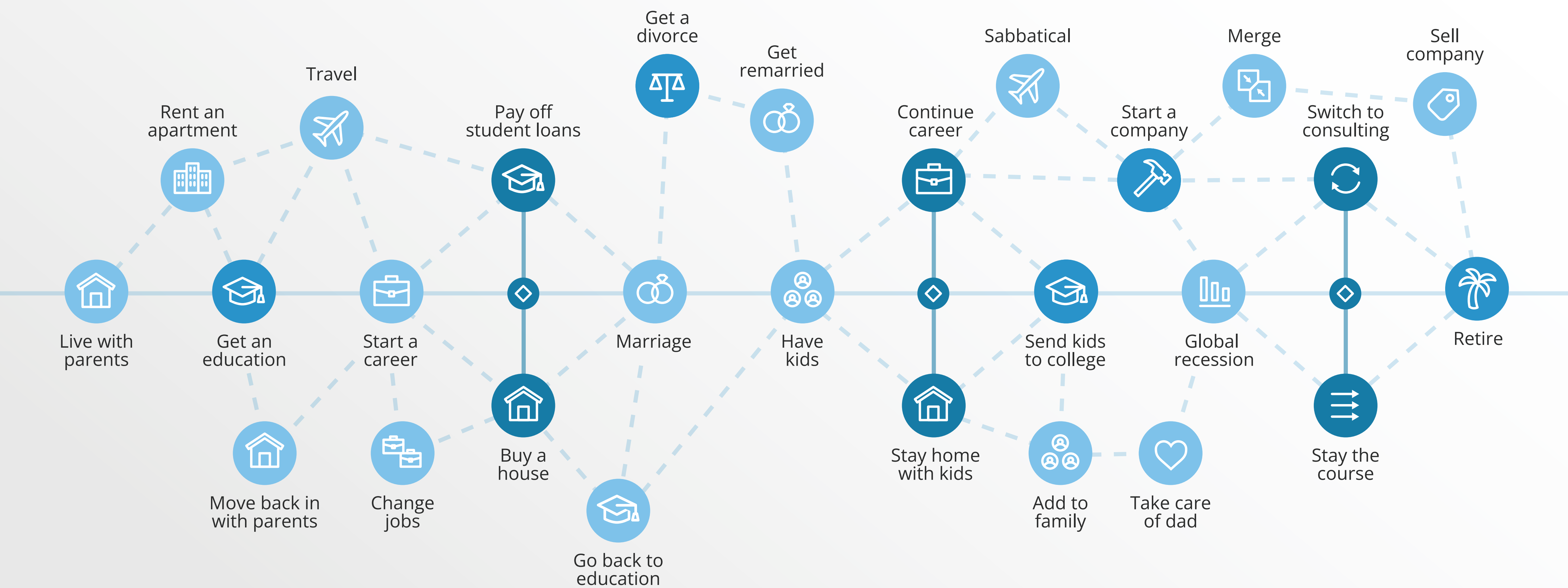
This means putting your best interests at the center of our planning approach. It means getting to know you, your family, your goals, and your greatest ambitions. All to craft a plan that embraces – and improves – the most important aspects of your life.

A clear path on life's winding road.

Life isn't linear:

Your plan shouldn't be either.

Navigating your finances through each phase of life requires more than just a plan. **It requires a partner.** Our advisors are with you through every step acting as a trusted confidant and fearless guide—your first phone call when something happens.



For illustrative purposes.

We’re different, and so are you.

Life changes, we evolve.

Your life is layered with significant events and nuanced circumstances that can influence your future. You can rely on us to help keep your plan on track, work with you on future needs, and help you navigate life's complexities with ease.

Our Process

First, we embark on a personal discovery process to uncover what’s important to develop a strategy addressing your values, priorities, and goals.

Backed by a comprehensive range of resources, we tailor a plan that’s right for you, with distinct objectives and attainable action items.

We continually work with you to adjust your plan to adapt to your personal situations and ever-changing financial landscape.

Your experience is everything to us.

Your strategy begins with you.

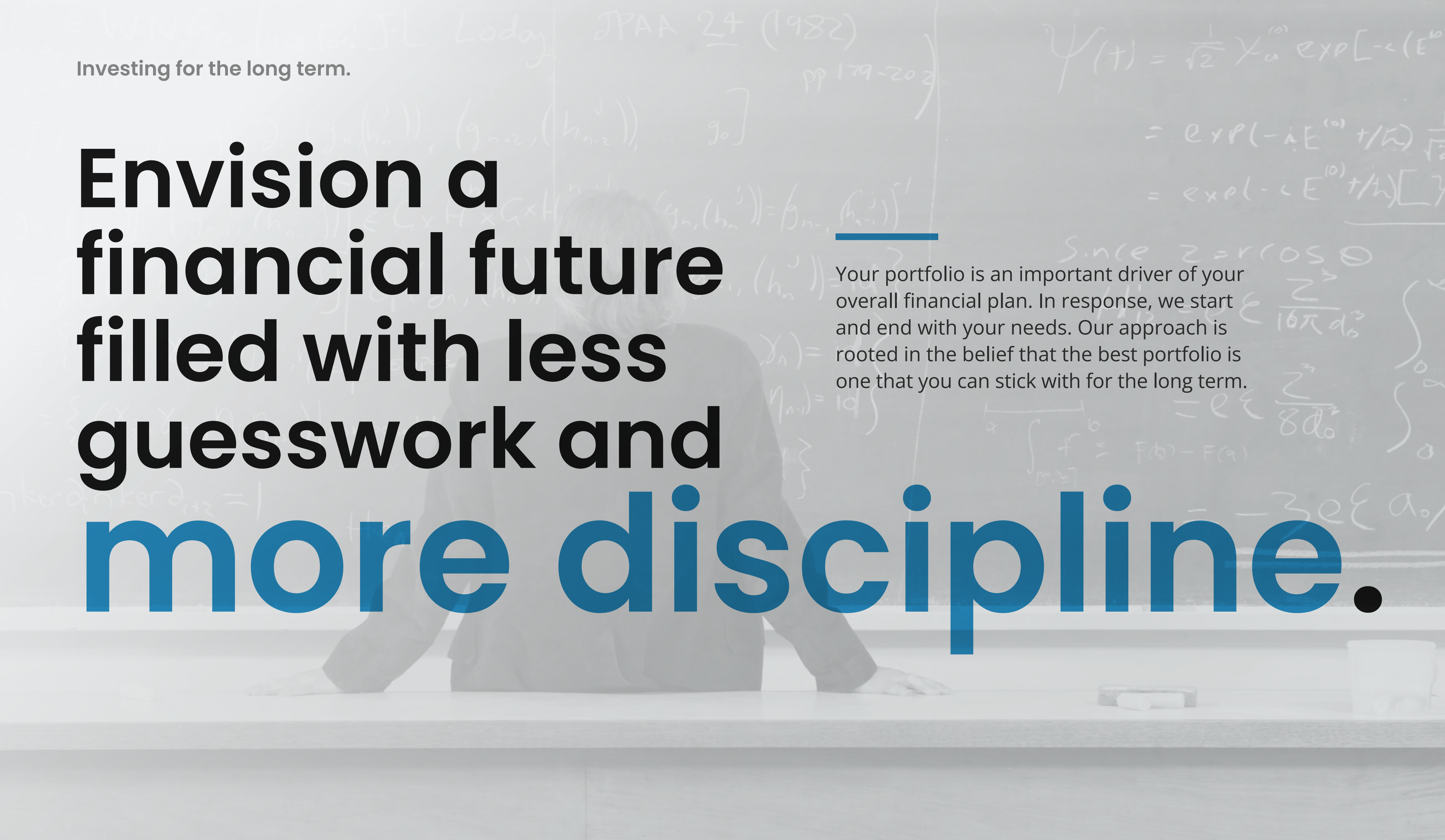
What do you really want? To support your favorite causes? To send your children or grandchildren to college? To feel confident you have enough?

Our planning approach is centered around your life: your goals, your dreams, and the impact you want to make on this world.

The Elements of a Wealth Strategy

We plan from the top down. Your dreams and passions are too important to leave up to chance. Our collaborative network of advisors serves as a think tank, where a kinetic mix of passion, drive, and diverse professional experience come together to benefit our clients.

Money, goals, life, and impact — our guidance transcends investment decisions. We believe that your experience should build upon the basics and encompass every aspect of your life when building a solid financial plan.



Envision a financial future filled with less guesswork and more discipline.

Your portfolio is an important driver of your overall financial plan. In response, we start and end with your needs. Our approach is rooted in the belief that the best portfolio is one that you can stick with for the long term.

We focus on the areas within your control — setting a thoughtful investment strategy and following a **disciplined** review process.

We love working with data. We construct our portfolios out of diversified stock funds; high-quality bonds; and, in some cases, alternative investment strategies. We help you focus on what you can control throughout the ups and downs of the market.

We put our best minds to work. Our committee-based approach to investment policy and advanced financial planning strategies is rooted in collaboration. Together, we selectively apply research to drive our investment and financial planning policies.[1]

[1] One of the earliest and most important academic studies that informs our investment philosophy is Nobel Prize-winning economist Harry Markowitz's groundbreaking research on portfolio selection, first published in March 1952. "Portfolio Selection," Harry Markowitz. The Journal of Finance, Vol. 7, No. 1. (Mar., 1952), pp. 77-91.

Across the nation and in your neighborhood.

National presence on a first-name basis.

Your advisor collaborates with colleagues from offices around the country; each embody wide-ranging technical and intellectual insight. No silos here. Our team of advisors is on call to support, inform, and advise you.

Responsive Advisors

We lead with service. We are team players, neither siloed nor territorial, and built to serve our clients with the collective intelligence and experience of our greatest minds working together.

Resourceful Thinkers

Never complacent, our entrepreneurial spirit keeps us curious, excited, and optimistic about the future. We relentlessly push forward, seeking new ways to help as many people as possible.

Reimagining Your Future

We are stewards of tomorrow, dedicated to fostering meaningful growth for our clients and the financial services industry. By doing what's right, we ensure every step forward benefits both present needs and future possibilities.

Who's on your team?

Your Advisory Team

Our advisors are out front, visible, and reachable. We spend our time strengthening relationships by asking and answering questions, and we are always available to provide support and guidance.

The Broader Focus Partners Family

Our firm's network of advisors share investment planning and insights with each other so you can benefit from the latest knowledge.

Other Professionals

We collaborate with industry leaders and strategic partners to deliver a well-rounded financial planning experience. We will work closely with your other professional advisors, such as attorneys and CPAs, to ensure your strategies are cohesive.

Ready to Start Your Focus Partners

Experience?

Experience a sense of calm

and confidence when you collaborate with your advisor to create a plan that's right for you.

Experience a rational way to invest and plan

with a financial plan guided by discipline to meet your needs.

Experience the best of both worlds

The personal touch of an advisor partner backed by national thought leadership resources and intellectual insight.

What You Pay

From the start, your advisor will provide clear and transparent pricing information aligned with your unique scenario. We price our services on various factors, including your personal financial situation and assets managed; at each incremental breakpoint, you pay less on the dollar.

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Services are offered through Focus Partners Wealth, LLC ("Focus Partners"), an SEC registered investment advisor with offices throughout the country. Registration with the SEC does not imply a certain level of skill or training and does not imply that the SEC has endorsed or approved the qualifications of Focus Partners or its representatives. Prior to January 2025, Focus Partners was named The Colony Group, LLC. Focus Partners has been part of the Focus Financial Partners partnership since 2011.

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