
Bartlett to Join Focus Financial Partners

- Cincinnati-based Wealth Management Firm Expands Focus' Footprint in Midwest-

New York, NY – February 23, 2018 – Focus Financial Partners ('Focus'), a leading international partnership of independent, fiduciary wealth management firms, today announced that Bartlett & Co., LLC ("Bartlett"), a registered investment advisory firm¹ based in Cincinnati, Ohio, has entered into a definitive agreement to join the partnership.

The origins of Bartlett date back to 1898, when Benjamin Bartlett first bought his seat on the New York Stock Exchange. Bartlett's namesake firm was one of the first to register with the SEC as an investment adviser (RIA) under the Investment Advisers Act of 1940. Throughout its history, the firm has built a strong reputation in the local community as a trusted wealth advisory firm. In 2007, the firm named Kelley Downing as the President and CEO of Bartlett, the first woman to hold this role.

In conjunction with the closing of the transaction, Bartlett will be rebranding as "Bartlett Wealth Management, LLC" to better communicate its core services and commitment to client-centric fiduciary advice. Bartlett will also expand its leadership team from 11 to 17 Principals to include members of its next generation leadership.

"Bartlett has always been forward-thinking, and as our management team looks at the firm's long-term future, we see additional opportunities for continued growth and enhancement of our services, people, tools, and technology with this partnership," said Kelley Downing, CEO of Bartlett. "With access to Focus' value-added resources and capital, we can secure a smooth path of succession for our company and our talented next generation leaders while providing continuity for our clients, ensuring they receive the same outstanding service they've always enjoyed from our team."

"We are delighted to welcome our first partner firm in Ohio. Bartlett impressed us with its integrity and investment acumen, as well as the entrepreneurial excellence of its management team," said Rudy Adolf, Founder and CEO at Focus. "The firm's genuine desire to do what is best for its clients, employees and business is a perfect match with our values at Focus. We believe that Bartlett has the capabilities to consolidate the RIA market in Ohio and we are excited to support their continuous growth."

Cambridge International Partners, a NY-based M&A advisory firm, advised Bartlett on the transaction.

The closing of the transaction is subject to customary closing conditions and is expected to happen on April 1, 2018.

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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, employers and institutions with wealth management, benefits

¹ Registration as an investment advisory firm does not imply a certain level of skill or training.

consulting and investment consulting 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 Bartlett

Bartlett & Co LLC is a Cincinnati-based wealth management firm, providing customized investment management and financial planning services to high net worth families, foundations and businesses. Bartlett takes pride in providing clients independent personalized fiduciary advice through a team of distinguished investment professionals. For more information, visit www.Bartlett1898.com or call 513.621.4612.