CORIENT

Corient Acquires Breed's Hill Capital, a Premier Wealth Advisor Providing Dedicated Service to Ultra-High-Net-Worth Families

Boston-based firm with $3.5 billion in assets joins Corient, expanding its New England presence

MIAMI (September 4, 2025) – **Corient**, one of the nation's largest and fastest-growing national wealth management firms, today announced it has acquired **Breed's Hill Capital**, a Boston-based multi-family office with approximately $3.5 billion in assets under management. The transaction expands Corient's presence in New England and enhances its ability to deliver personalized, fiduciary wealth management services to ultra-high-net-worth individuals, families and institutions across the region.

Since its founding in 2013 by John J. Edwards, Breed's Hill Capital has provided investment advisory and financial planning services tailored to the sophisticated requirements of ultra-high-net-worth families. The firm provides customized strategies to deliver investment management, estate and gift and tax planning and insurance and asset protection. The Breed's Hill Capital team works with the client to develop, implement and maintain a comprehensive plan designed to achieve their financial objectives.

"Breed's Hill Capital has a proud legacy of high-touch wealth planning and enduring client relationships that mirror our own values and approach," said Kurt MacAlpine, Partner and Chief Executive Officer of Corient. "Their extensive experience in managing the complexities of very wealthy clients and their relentless commitment to excellence make them a natural fit for Corient. As part of the Corient Partnership, John and his team can significantly enhance the services offered to their clients while deepening our firm's expertise and roots in New England."

"We work to empower our clients by bringing clarity to their financial lives," said Mr. Edwards, Founder and Chief Executive Officer of Breed's Hill Capital. "The Corient Partnership was a decisive factor in our decision to join the firm. It allows us to maintain our high service standards while gaining access to deeper resources, expanded capabilities and a national network of like-minded partners who share our values, fiduciary approach and long-term vision for clients."

Corient is a fiduciary, fee-only wealth management firm distinguished by its unique private partnership model, similar to leading professional services firms. This structure allows clients to access the broad array of expertise and resources available at Corient, rather than relying solely on the advisor assigned to them. The approach is designed to foster collaboration and teamwork in pursuit of the shared vision to deliver incomparable client excellence. Since its founding in 2020, Corient has grown rapidly and today has more than 260 partners and over 1,300 employees managing approximately $216 billion on behalf of ultra-high and high-net-worth individuals, families and businesses across the United States.

Cambridge International Partners LLC served as financial advisor and Mintz served as legal counsel to Breed's Hill Capital. Terms were not disclosed.

About Corient

Corient Private Wealth LLC is an integrated national U.S. wealth management firm providing comprehensive solutions to ultra-high-net-worth and high-net-worth clients. We combine the personal service, creativity and objective advice of a boutique with the power of an exclusive network of experienced advisors, capabilities and solutions to create a profoundly different wealth experience. As fiduciaries, we put our clients at the center of everything we do. We focus on exceeding expectations, simplifying lives and establishing lasting legacies. Headquartered in Miami, Corient has offices across the United States. For more information, visit corient.com.

Corient client assets are as of July 31, 2025, and reflect the aggregate assets of Corient Holdings Inc. ("Holdings"), Corient Private Wealth LLC's upstream U.S. holding company. Client assets include the assets in which Holdings has a majority or minority investment and signed, but not yet closed transactions in the U.S. Certain assets are not considered Regulatory Assets Under Management, as defined by the SEC and reported in Corient Private Wealth LLC's Form ADV.

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