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Corient Adds Bristlecone Advisors,

Expanding Pacific Northwest Presence with $2-Billion Multi-Family Office

MIAMI (October 2, 2025) – **Corient,** one of the largest and fastest-growing national wealth advisors, today announced the acquisition of Bristlecone Advisors, LLC ("Bristlecone"), a Bellevue, Washington-based registered investment advisor firm with approximately $2 billion in assets under management.

Founded in 1999, Bristlecone delivers comprehensive wealth management and family office services, blending personalized financial planning with a disciplined, research-driven investment process. Its integrated offerings span financial planning, tax and estate services, philanthropy, real asset and risk management and specialized projects.

"Since our founding, Bristlecone has served as a trusted partner and personal CFO for ultra-high and high-net-worth families," said **Kevin Berry**, Partner, Managing Member and Chief Compliance Officer at Bristlecone. "To continue meeting the evolving needs of our clients, we recognized the importance of bolstering our service offering and operational capabilities. Corient's unique private partnership not only gives us the additional services, scale and resources to achieve that – but also a formidable bench of talent with whom we can partner and collaborate to do more for clients. Corient's culture of excellence and integrity mirrors our own and we're proud to become Corient Partners."

"Bristlecone's exceptional team, strong growth and established presence in the Pacific Northwest make them an excellent fit for Corient," added **Kurt MacAlpine**, Partner and Chief Executive Officer of Corient. "Their focus on ultra-high and high-net-worth families and commitment to fiduciary excellence align perfectly with our efforts to reset the standard for what a modern multi-family office can deliver. I'm thrilled to welcome them into the Corient Partnership."

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 served as financial advisor to Bristlecone.

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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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