Focus Financial Inc. announces acquisition of Cardinal Point Wealth Management, LLC

April 24, 2019

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On September 16, 2021, Focus Financial Partners Inc. (NASDAQ:FOCS) (Focus), a leading partnership of independent, fiduciary wealth management firms, announced that Cardinal Point Capital Management Inc. and Cardinal Point Wealth Management, LLC (together, Cardinal Point) have entered into a definitive agreement to join the Focus partnership. The transaction is expected to close in the fourth quarter of 2021, subject to the receipt of regulatory approval and other customary closing conditions.

Since 2009, Cardinal Point has provided personalized investment and estate, tax and financial planning solutions to high-net-worth individuals and families in both the United States and Canada. Over the last twelve years Cardinal Point has built a reputation as a leader in cross-border wealth management through its integrated approach to addressing the complex needs of its clients. The transaction brings a unique value proposition to the Focus partnership while also expanding Focus' presence in Canada.

BLG is representing Focus with a team led by Julie Mansi and including Carlos Cerqueira, Steve Suarez, Sarah Gardiner and Joelle Kabouchi.

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