VISION *for* VISIONARIES.

PARTNERS & FOCUS CELEBRATE IPO

WHO IS IN THE PICTURE?

We are strategic investors in RIAs—providing you with value-added support, access to capital for growth, and succession planning to help you bring your vision to life and take your firm to new heights—all under your continuing leadership.

We aspire to be the partnership of choice for entrepreneurial, growth-oriented wealth management firms who put clients first, committing themselves to outstanding client service.

We are passionate believers in a highly transparent approach to wealth management, unlike some large institutions. At the same time, unlike some smaller firms, we have scale-based access to resources and bench strength to ensure the continuity of your legacy for generations to come.

IT'S THE STRENGTH OF MANY, THE POWER OF ONE.

See why other firms have joined Focus

“We joined Focus in 2017, and by 2018 had already completed a

merger, adding bench strength and scale.”

— Levi McMellian, CFO4Life

Focus Partner Since 2017

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