INTEGRITY.
INDEPENDENCE.
INSIGHT.

WELCOME TO
ICON WEALTH PARTNERS

Welcome to Icon Wealth Partners, an independent, privately-held wealth advisory firm providing comprehensive wealth management and financial advice to a select group of business owners and executives, high-net-worth families and entrepreneurs throughout the country.

Driven by our core values and entrepreneurial spirit, Icon Wealth Partners offers clients an elevated standard of service marked by *integrity, independence and insight*.

OUR FIRM

Our Mission

At Icon Wealth Partners, our mission is clear: to address the long term goals of our clients and their families with customized financial strategies, investment and liquidity solutions delivered with the utmost integrity, transparency and commitment to the fiduciary standard.

Headquartered in Houston, Texas, Icon Wealth Partners leverages the diverse talents of our three Founding Partners who, together, have more than 60 years of wealth management experience. Prior to forming Icon Wealth Partners, our Founders were entrusted with $750 million in client assets at their previous Wall Street firms.

PRIVATE CLIENT LOGIN

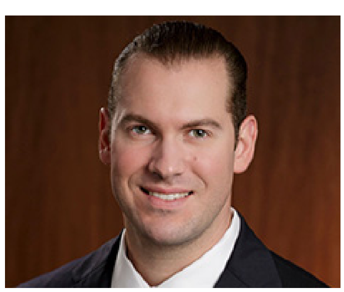
Our Team

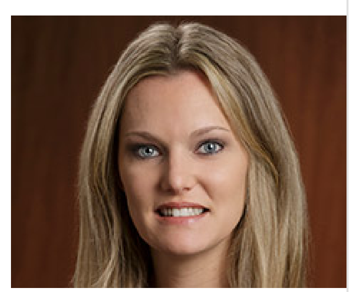
Mark McAdams
Founder and Managing Partner
Mark.McAdams@iconwp.com
(713) 904-5025

Blake Pratz
Founder and Managing Partner
Blake.Pratz@iconwp.com
(713) 904-5021

Steve Schwarzbach
Founder and Managing Partner, Certified Private Wealth Advisor®
Steve.Schwarzbach@iconwp.com
(713) 904-5024

Mike Cregan
Managing Director, Head of Fixed Income Strategies
mike.cregan@iconwp.com
(713) 904-5029





Ricardo Mihaly, CFP®
Director of Planning and Investments
Ricardo.Mihaly@iconwp.com
(713) 904-5027

Brando Palazzo
Wealth Advisor
Brando.Palazzo@iconwp.com
(713) 904-5030

Annette Latigue
Senior Client Relationship Manager
Annette.Latigue@iconwp.com
(713) 904-5026

Jennifer Moore
Senior Client Relationship Manager
Jennifer.Moore@iconwp.com
(713) 904-5023

Cindy Pickett
Senior Client Relationship Manager
Cindy.Pickett@iconwp.com
(713) 904-5022

Scott Welch
Director of Investment Platforms
scottwelch@dynastyfinancialpartners.com
(212) 373-1000

Our Investment Committee

Our Investment Committee includes our three Founding Partners as well as senior level investment professionals with varied financial experience. Their knowledge and perspective combine to serve as an additional layer of expertise, insight and objectivity in support of our ongoing fiduciary commitment.

As we represent our clients’ best interests first and always, the Committee is an impeccable resource that contributes a range of perspectives to the evaluation of economic and market data, the analysis of fundamentals and ideas, and the formulation of sound investment strategy decisions. The Committee applies a rigorous and disciplined process to ensure that client portfolios are grounded in a combination of global research and expertise along with our own individual experience.

ICON WEALTH PARTNERS: SETTING THE STANDARD

A NEW BENCHMARK OF ELEVATED SERVICE

OUR STORY

Overview

After spending many successful decades in the financial services industry, Icon Wealth Partners' three Founding Partners realized the time was right for change. They saw an opportunity to create a new and industry-leading firm, one unbridled by corporate mandates and limitations. Founding Partners Mark McAdams, Blake Pratz and Steve Schwarzbach saw the potential to create a new business they could shape and drive with experience and entrepreneurial vision.

The result is Icon Wealth Partners, a new firm characterized by *independence, integrity and insight*. Fully embracing the fiduciary standard, Icon Wealth Partners offers a new model that melds deep commitment to client relationships with superior resources, sophisticated wealth advisory services and investment acumen.

Driven by our clients' best interests at all times, Icon Wealth Partners delivers customized, highly tailored and experience-based service to our valued clients.

Independence and full ownership equip us to operate exclusively on behalf of our clients. Free from corporate constraints, we offer unrestricted access to outstanding opportunities, institutional research and intellectual capital on a global basis — and thus, serve more effectively as our clients' advocate and trusted advisor.

As an independent firm, we avoid conflicts of interest inherent in the traditional Wall Street model. Because we do not accept any undisclosed economic benefits from outside resource providers, clients are assured of consistently objective advice. Independence also facilitates transparency, particularly with respect to fees, and reduces limitations in areas such as performance reporting, custody, alternative investments, trust services and lending.

At Icon Wealth Partners, we separate advice, custody and investment selection to ensure client-focused operations based on the fiduciary standard. As owners of an independent firm − and entrepreneurs − we are dedicated to elevating our clients' experience to forge lasting relationships focused on achieving their long-term goals.

What are the benefits of independence for my family and me?

Icon Wealth Partners is an independent Registered Investment Advisory (RIA) firm. Unlike some other types of Wall Street institutions, RIA firms are fiduciaries and, therefore, required to always act in the best interest of their clients. While we have always held ourselves to this higher standard, we have created a firm that is aligned with it, focused on client goals and objectives. Our move to independence speaks to the genuine objectivity of our advice and direct access to a wide array of offerings from our extensive network of leading financial services providers. We can now enhance our clients' experience and continue to build lasting relationships while focusing on their long-term goals.

How will independence impact my relationship with you?

You can be confident that we will continue to provide the outstanding service and attention you've come to expect in working with us over the years. Our [obscured] to the core principles that define our practice — and to a culture of int[obscured] values and enduring relationships — is a hallmark of our new firm.

Our move to independence removes many of the conflicts of interest that are often a part of the traditional Wall Street model. It speaks to the genuine objectivity of our advice and direct access to a wide array of offerings from our extensive network of leading financial services providers. We do not accept undisclosed economic benefits from any outside resource provider, so you can be assured that our advice to you is based solely on your best interests.

How will independence affect your approach to portfolio management?

The core principles of our portfolio management approach — diversification, downside protection, risk-adjusted performance, tax efficiency — remain the same. Our belief is that you benefit from a detailed process that results in a wealth management strategy addressing all aspects of your financial position. We then leverage and customize those strategies and solutions to provide our clients a focused, boutique-level experience.

As an independent firm, we can employ a wide range of portfolio management resources available, from third-party global research to institutional asset managers to state-of-the-art consolidated reporting. Our integrated approach encompasses investments, lending, insurance, trust and estate guidance, charitable giving and more — all coordinated to help you completely understand your wealth today so you can fully realize your vision for tomorrow.

Where will my assets be held?

As a Registered Investment Advisor, Icon Wealth Partners does not hold your assets. We have selected Fidelity, one of the world's largest custodians of financial assets and a leading provider of custodial services in the RIA space, as our primary custodian on behalf of our clients.

Fidelity Custody and Clearing Solutions is one of the leading providers of trading, custody and brokerage services, custodianship, cost-effective pricing and, most important, outstanding service. Fidelity is a family-managed, privately-held company with more than 60 years of experience serving more than 23 million in institutions, as well as more than 10,000 financial intermediary firms. December 31, 2016, it had assets under administration of $5.7 trillion, including managed assets of $2.1 trillion.

Will there be regulatory oversight of my assets?

Absolutely. As an SEC Registered Investment Advisor, we are subject to SEC rules mandating matters such as disclosures of conflicts, recordkeeping and business conduct. We are also subject to its oversight and inspection program. As a fiduciary, we are held to the highest standards of trust and confidence, meaning we are legally required to follow prudent investor practices and seek solutions that are in the best interests of all our clients.

Who is Dynasty Financial Partners?

We are independent, but not alone. Icon Wealth Partners has partnered with one of the industry's most respected wealth management support platforms, Dynasty Financial Partners. Through our strategic partnership with Dynasty, we have access to some of the leading wealth management solutions and services available in the industry. Dynasty is a premier provider of wealth management and technology platforms for RIA firms. Dynasty was founded by a group of experienced wealth management professionals who deeply believed in the value of true independence. The Dynasty team comprises senior executives from the wealth management industry and its board members include: Harvey Golub, former chairman of American Express; Bill Donaldson, former chairman of the SEC; and Todd Thomson, former CFO of Citigroup.

Through Dynasty, Icon Wealth Partners' clients benefit from the scale of more than 40 firms that are currently part of the Dynasty network. Advisors within the Dynasty network manage more than $20 billion in client assets, providing Icon Wealth Partners great leverage and insight into what the leading firms in the industry are doing.

OUR APPROACH

CLIENT AND INVESTMENT PROCESS

Our clients' goals are unique, specific and often, complex — which is why, at Icon Wealth Partners, we perform a thorough assessment of each client's financial picture. Only in this way can we build a comprehensive plan that reflects clients' goals and addresses their precise needs. In fulfilling plan objectives, we deliver the elevated boutique experience our clients expect and decidedly deserve. Because we view wealth management as a collaborative process, we create an environment characterized by proactive and consistent communications as we explore with our clients the various components of their plans.

INVESTMENT MANAGEMENT PROCESS

Highlight the boxes below for more information.

RESOURCE PARTNERS

Independent but not alone, we have partnered with some of the industry's most respected wealth management support providers to ensure comprehensive wealth management. Separating advice, custody and investment vehicle selection assures client-focused operations that uphold the fiduciary standard.

Highlight the logos below for more information.

ADVISOR CAREERS

WELCOME TO ICON WEALTH PARTNERS

Thank you for your interest in Icon Wealth Partners, a privately held, independent wealth advisory firm headquartered in Houston, TX. When we founded the firm in 2017, we had two important goals in mind: create an enhanced experience for our clients and to build a premier destination for high-performing advisors. Regardless if you are in the early, mid, or late stages of your career, we'd like to discuss the benefits of independence with you.

Understanding the unique challenges advisors face today, we designed Icon Wealth Partners with a key set of guiding principles:

For Our Clients:

A client-centered experience that is both more personalized and fully transparent.

An unwavering commitment to the Fiduciary Standard of Care through a true open-architecture platform.

For Our Partners and Advisors:

Superior economics for advisors, both in terms of payout as well as creation through equity ownership.

An advisor-centered culture built on partnership, collaboration, and a practical, less bureaucratic approach to how you run your business.

A dedicated focus on helping you deepen your client relationships and strategically grow your business.

We are currently seeking like-minded advisors to join our firm — advisors who are both entrepreneurial and who strongly believe in the Fiduciary Standard of serving clients. To learn more about how Icon Wealth Partners and the independent advisory space could benefit you, CLICK HERE.

NEWS

Four Wirehouse Myths About Independence

DECEMBER 3, 2018

by Austin Philbin View Original Article – wealthmanagement.com The t
a traditional financial institution to becoming a registered investment
exercise in faith. From a knowledge perspective, educated consumers are aware of the shift of assets out of banks and brokerage houses into independent custodians. However, statistics alone oftentimes are not enough […]

READ MORE › [HTTP://ICONWP.COM/FOUR-WIREHOUSE-MYTHS-ABOUT-INDEPENDENCE/]

Icon Wealth Partners Visits Annual Top Golf Tournament Fundraiser Hosted by Young Life Greater Houston Region

NOVEMBER 16, 2018

Icon Wealth Partners is very proud to support Young Life Greater Houston Region at their annual Top Golf Tournament fundraiser. This amazing non-profit works with youth from disadvantaged socioeconomic backgrounds by providing them with much needed encouragement, mentorship and an unforgettable annual camp experience!

READ MORE › [HTTP://ICONWP.COM/ICON-WEALTH-PARTNERS-VISITS-ANNUAL-TOP-GOLF-TOURNAMENT-FUNDRAISER-HOSTED-BY-YOUNG-LIFE-GREATER-HOUSTON-REGION/]

Houston-Based Independent Advisory Firm, Icon Wealth Partners, Welcomes Brando Palazzo as a Wealth Advisor

SEPTEMBER 11, 2018

HOUSTON—September 07, 2018 – Icon Wealth Partners, a privately-held, independent wealth advisory firm headquartered in Houston, TX, today announced they have expanded their wealth advisory team with the addition of Brando Palazzo.

Mr. Palazzo brings over eight years of wealth advisory experience and is focused on bringing Icon's unique model of wealth management and financial […]

READ MORE › [HTTP://ICONWP.COM/HOUSTON-BASED-INDEPENDENT-ADVISORY-FIRM-ICON-WEALTH-PARTNERS-WELCOMES-BRANDO-PALAZZO-AS-A-WEALTH-ADVISOR/]

Houston-Based Independent Advisory Firm, Icon Wealth Partners, Expands Investment Team With the Addition of Industry Veteran Mike Cregan as Managing Director-Head of Fixed Income Strategies

JUNE 11, 2018

NEW YORK—June 11, 2018 – Icon Wealth Partners, a privately-held, independent wealth advisory firm headquartered in Houston, TX, today announced that they have expanded their investment team with the hiring of Mike Cregan, Managing Director and Head of Fixed Income Strategies. Mr. Cregan will also join the firm's Investment Committee. At Icon Wealth Partners, Mr. […]

READ MORE › [HTTP://ICONWP.COM/MIKECREGANJOINS/]

Houston Food Bank Visit

JUNE 4, 2018

Icon Wealth Partners made another visit to the Houston Food Bank where we participated in their Backpack Buddy Program. We helped in preparing 4,650 backpacks which will provide 27,900 meals to Houston children in need. We are honored to work with the nation's largest food bank and look forward to participating in more projects in the […]

READ MORE › [HTTP://ICONWP.COM/HOUSTON-FOOD-BANK-2/]

Breakaway Advisors Absolutely Love Their Independence

JANUARY 2, 2018

PRIVATE CLIENT LOGIN

View Original Article – Financial Times It's almost comical. One hundred percent of former wirehouse or regional-brokerage advisors in the independent RIA channel are happier for having made the move. That's according to a blind survey of 450 FAs by Dynasty Financial Partners — a sponsor that, as an infrastructure provider to breakaway RIAs, has to […]

READ MORE › [HTTP://ICONWP.COM/BREAKAWAY-ADVISORS-ABSOLUTELY-LOVE-INDEPENDENCE/]

Houston Food Bank

SEPTEMBER 15, 2017

Icon Wealth Partners first volunteer day at the Houston Food Bank. Great organization and wonderful opportunity for Icon to give back to our local community.
https://www.linkedin.com/feed/update/urn:li:activity:6298616721595002881

READ MORE › [HTTP://ICONWP.COM/HOUSTON-FOOD-BANK/]

Ricardo Mihaly Earns the CFP® Designation

SEPTEMBER 12, 2017

Ricardo Mihaly, Director of Planning & Investments at Icon Wealth Partners has been authorized by the Certified Financial Planner Board of Standards (CFP Board) to use the CERTIFIED FINANCIAL PLANNER™ and CFP® certification marks in accordance with CFP Board certification and renewal requirements. Ricardo has worked at Icon since the firm's inception and has over 20 […]

READ MORE › [HTTP://ICONWP.COM/RICARDO-MIHALY-EARNS-CFP-DESIGNATION/]

Three Texas Advisors Break Away Into Mega-RIA

FEBRUARY 24, 2017

by Christopher Robbins View Original Article — Financial Advisor Three wirehouse advisors managing a combined $750 million broke away fro employers to form a giant RIA, Dynasty Financial Partners announced on Thursday. Two long-time Morgan Stanley advisors, Mark McAdams and Steve Schwarzbach, have joined forces with Blake Pratz, a UBS veteran, to form […]

READ MORE › [HTTP://ICONWP.COM/THREE-TEXAS-ADVISORS-BREAK-AWAY-MEGA-RIA/]

Wirehouse advisers with $750M in combined AUM go indie with Dynasty

FEBRUARY 23, 2017

By Tobias Salinger View Original Article — OnWallStreet Three wirehouse advisers managing $750 million in combined client assets broke away to launch their own firm with help from Dynasty Financial Partners, according to the company. Mark McAdams, Blake Pratz, and Steve Schwarzbach opened Icon Wealth Partners last week after more than two years of considering […]

READ MORE › [HTTP://ICONWP.COM/WIREHOUSE-ADVISERS-750M-COMBINED-AUM-GO-INDIE-DYNASTY/]

Breakaway UBS, Morgan Stanley teams form $750M RIA

FEBRUARY 23, 2017

View Original Article — InvestmentNews Houston-based Icon Wealth Partners affiliates with Dynasty Financial Partners Advisory teams from Houston offices of UBS and Morgan Stanley that collectively managed $750 million have formed Icon Wealth Partners and affiliated with Dynasty Financial Partners. The new firm is headed by Mark McAdams and Steve Schwarzbach, who came from Morgan […]

READ MORE › [HTTP://ICONWP.COM/BREAKAWAY-UBS-MORGAN-STANLEY-TEAMS-FORM-750M-RIA/]

Two Leading Financial Advisory Firms Combi Launch Icon Wealth Partners: Firm Immediately Becomes One of the Largest Independent Wealth Advisory Firms in Texas

FEBRUARY 23, 2017

Dynasty Financial Partners today announced that Icon Wealth Partners becomes the most recent independent advisory firm to select Dynasty Financial Partners' open architecture of wealth management services and technology. Having previously managed over $750 million in client assets at their prior firms, three founding partners Mark McAdams, Blake Pratz, and Steve Schwarzbach launched Icon Wealth Partners as an independent advisory firm on February 17, 2017.

READ MORE › [HTTP://ICONWP.COM/TWO-LEADING-FINANCIAL-ADVISORY-FIRMS-COMBINE-LAUNCH-ICON-WEALTH-PARTNERS-FIRM-IMMEDIATELY-BECOMES-ONE-LARGEST-INDEPENDENT-WEALTH-ADVISORY-FIRMS-TEXAS/]

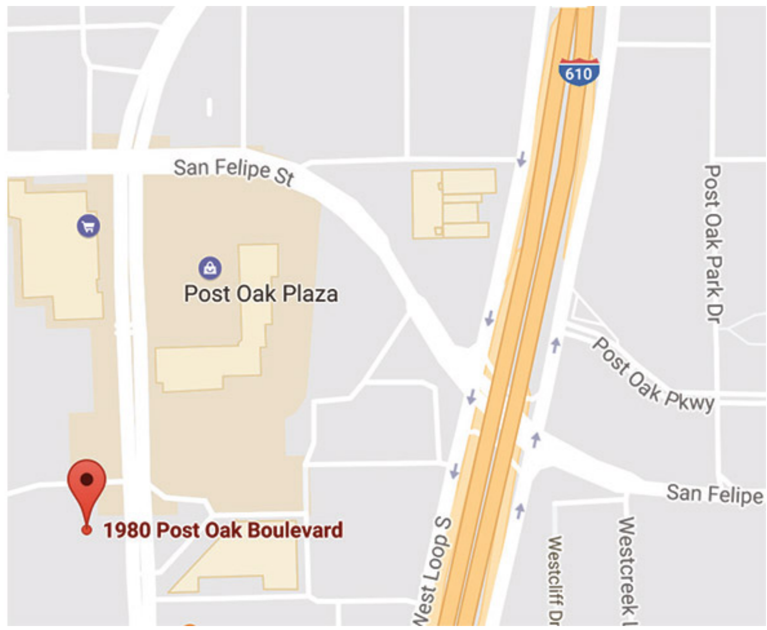
UBS, Morgan Stanley Teams in Texas Merge into Independence

FEBRUARY 23, 2017

by Grete Suarez View Original Article — AdvisorHub A trio of Houston brokers—two from Morgan Stanley and the third from UBS Financial Services—joined forces last Friday to create Icon Wealth Partners, a registered investment adviser, according to Dynasty Financial Partners, which assisted them with the move. The Morgan Stanley partners, Mark McAdams and Steve Schwarzbach, […]

READ MORE › [HTTP://ICONWP.COM/UBS-MORGAN-STANLEY-TEAMS-TEXAS-MERGE-INDEPENDENCE/]

CONTACT US



ICON WEALTH PARTNERS

www.iconwp.com

email: info@iconwp.com

1980 Post Oak Boulevard, Suite 1300

Houston, Texas 77056

Telephone: 713-904-5020

Fax: 713-904-5040

DIRECTIONS

Our office is located at 1980 Post Oak Boulevard in Houston's Galleria-Uptown neighborhood, near the corner of Ambassador Way.

FROM THE WEST

- Take I-10E toward Houston.
- Use the two right lanes to take Exit 763 for I-610S.
- Stay right and merge onto I-610S.
- Take Exit 9B toward Post Oak Boulevard.
- Merge onto West Loop S.
- Turn right onto Post Oak Boulevard.
- Our building is on the right.

FROM THE NORTH

- Take I-45S toward Houston.
- Use the three right lanes to take Exit 51 to merge onto I-610W.
- Take Exit 9B toward Post Oak Boulevard.
- Merge onto West Loop S.
- Turn right onto Post Oak Boulevard.
- Our building is on the right.

FROM THE EAST

- Take I-10W toward Houston.
- Take Exit 763 for I-610S/I-610N.
- Keep left at the fork and merge onto I-610S.
- Take Exit 9B toward Post Oak Boulevard.
- Merge onto West Loop S.
- Turn right onto Post Oak Boulevard.
- Our building is on the right.

FROM THE SOUTH

- Take State Highway 288N toward Houston.
- Stay in the second lane from the right to take the I-610 exit.
- Stay left and follow the signs for I-610W.
- Take Exit 9 toward San Felipe Street/Post Oak Boulevard.
- Merge onto West Loop S.
- Use the two left lanes to turn left onto San Felipe Street.
- Turn left onto Post Oak Boulevard.
- Our building is on the right.