



WEALTH PARTNERS CAPITAL GROUP

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WEALTH PARTNERS CAPITAL GROUP LAUNCHES WITH THREE ANCHOR INVESTMENTS

New RIA Aggregation Business Launches with over \$11 billion in Client Assets

WEST PALM BEACH, FL - July 10, 2017 - Wealth Partners Capital Group, LLC (“WPCG”), a new firm focusing on the aggregation of smaller U.S. wealth management businesses, launches with the closing of minority investments in three platform firms: Forbes Family Trust (“FFT”), MAI Capital Management (“MAI”), and EP Wealth Advisors (“EPWA”). The management teams of each firm will continue to hold a majority of the equity in their business and control of day-to-day operations.

The WPCG management team of John W. Copeland, Rich Gill and Sean Bresnan were previously senior executives in the wealth management business of Affiliated Managers Group, Inc. (“AMG”). WPCG has received capital from a number of high profile individual investors, along with an investment from AMG in the form of the contribution of its minority interest in FFT, and will assist its three partner firms to expand via the acquisition of smaller, high quality RIA firms which seek a supportive partner and operational platform to better serve clients and grow their business.

“We are focused on our partnerships with these three leading wealth advisory firms, run by deep and experienced management teams,” said John W. Copeland, Managing Partner. “As the independent wealth management industry continues to grow and mature, a long-term solution for smaller firms in need of business and operations support will be critical. We believe FFT, EPWA and MAI offer compelling opportunities to these firms.”

Each of the three firms chosen by WPCG as an aggregation partner has a strong regional brand, deep management and operational talent, extensive financial planning and investment capabilities, and a dedication to the client experience. Each of the three firms is uniquely positioned to offer advisors and their clients an optimal combination of service, advice and state-of-the-art operational capabilities.

As part of the transaction, the management teams of each firm have entered into long-term employment agreements with their respective firms. The terms of the transactions were not disclosed.

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About Wealth Partners Capital Group

Wealth Partners Capital Group (“WPCG”) is a financial services holding company, which has partnered with three leading wealth management firms via minority equity investments. The WPCG management team is led by partners John W. Copeland, Rich Gill and Sean Bresnan. www.wealthpcg.com

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About EP Wealth Advisors

EP Wealth Advisors, LLC is a fee-only registered investment advisory and financial planning firm based in Los Angeles, California. EP Wealth Advisors manages over \$2.9 billion in AUM as of June 30, 2017. With additional offices in the San Francisco Bay area, West Los Angeles, Irvine, California, Seattle, Washington, and Denver, Colorado, the firm provides client-centric financial planning, wealth management and investment management services to individuals and businesses. For more information, visit: www.epwealth.com

About Forbes Family Trust

Based in New York and Philadelphia, Forbes Family Trust manages approximately \$4 billion in HNW and UHNW assets. Senior partners Keith Bloomfield, P. Scott Gregorchuk, William Luterman, and James McGrath lead a team of professionals who provide comprehensive asset allocation and investment management to significant families. www.forbesfamilytrust.com

About MAI Capital Management

Based in Cleveland, OH, with offices in Ponte Vedra Beach, FL; Nashua, NH; Columbus, OH, and Irvine, CA, MAI Capital Management manages over \$4 billion in client assets. MAI provides comprehensive investment management and planning services to high net worth individuals, families and athletes and is led by Managing Partner Rick Buoncore, who oversees a team of more than 90. www.mai.capital