



Focus Partner Firm Connectus Wealth Advisers Launches *Excelerate With Connectus*¹, a Groundbreaking New Program to Drive Growth, Increase Adviser Efficiency and Enhance Client Outcomes

New York, NY – February 17, 2021 – Focus Financial Partners Inc. (NASDAQ: FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that its partner firm Connectus Wealth Advisers ("Connectus") is launching its groundbreaking *Excelerate with Connectus* program ("*Excelerate*"). Combining Focus' institutional knowledge and scale advantages with the power of a dedicated productivity team, *Excelerate* will enable Connectus advisers globally to deliver an exceptional client experience while achieving substantial operating efficiencies.

Excelerate is a highly curated program that leverages long-standing relationships with premier service providers already used extensively by Focus' 71 partner firms. A distinctive feature of *Excelerate* is the power of smart technology, which integrates a broad array of tools and resources to deliver a unified experience. Through its emphasis on shared resources, *Excelerate* will create significant efficiencies and scale benefits for advisers and clients alike.

Excelerate builds on strategic relationships with global service providers and will include local customization in the U.K. and Australia, in addition to the U.S. The program incorporates Focus' best practices and value-add resources, with the flexibility to allow each Connectus adviser team to maintain their boutique approach and client service model. All elements of *Excelerate* will also be made available to Focus partner firms.

Excelerate delivers capabilities across five business components, which will substantially enhance Connectus advisers' ability to increase growth while offering comprehensive, integrated and highly personalized client solutions.

1. **Accelerated Growth.** A proprietary marketing program that enhances business development through digital resources, adviser coaching and referral programs.
2. **Empowered Advisers.** An array of tools for developing insights and enhancing adviser productivity, along with access to institutional research and specialized investment alternatives that will enable better client service.
3. **Enhanced Digital Engagement.** The *Intelligent Adviser Hub*¹ and personalized client portals that will facilitate digital onboarding, customized reporting and other activities to increase client and adviser engagement.
4. **Comprehensive Value Proposition.** Family office and other specialized services, including trusts and estate planning, cash management and credit, and valuation and insurance, which will expand the adviser's ability to meet evolving client needs.
5. **Dedicated Productivity Team.** Specialized resources across talent management, compliance, finance, IT, operations and cybersecurity that will allow advisers to spend more time on value-added activities.

¹Trademark pending.

“We are thrilled to introduce *Accelerate*, a highly innovative program that is uniquely available through our partner firm Connectus,” said Rajini Kodialam, Co-Founder and Chief Operating Officer of Focus. “*Accelerate* has a flexible architecture that is designed exclusively around the evolving needs of the adviser and client. This program will provide advisers with all the technology and tools required to efficiently deliver holistic and highly personalized solutions to their clients, while also giving them the resources to accelerate the growth of their businesses. Additionally, *Accelerate* is built with the objective of providing an exceptional client experience. The program caters to the needs of sophisticated clients who want to work with advisers that offer fully integrated capabilities within a robust digital framework.”



Partial list of providers in the Connectus ecosystem.

About Focus Financial Partners Inc.

Focus Financial Partners Inc. is a leading partnership of independent, fiduciary wealth management firms. Focus provides access to best practices, resources and continuity planning for its partner firms who serve individuals, families, employers and institutions with comprehensive wealth management services. Focus partner firms maintain their operational independence, while they benefit from the synergies, scale, economics and best practices offered by Focus to achieve their business objectives. For more information about Focus, please visit focusfinancialpartners.com.

About Connectus Wealth Advisers

Connectus is a global consortium of client-centric advisers that deliver comprehensive wealth management advice through access to expanded services, shared resources and best practices. Connectus exemplifies the spirit of partnership and collaboration, yet celebrates the entrepreneurial mind-set of its advisers. Connectus is designed for founders and teams who want to continue to manage their client relationships and maintain their boutique cultures, while gaining the operational efficiencies of shared infrastructure and access to expanded client service capabilities.

Through Focus, Connectus advisers gain a strategic growth partner with specialized expertise. They benefit from Focus' scale and extensive network, continuity planning, insights and best practices. Focus is also a source of permanent capital to accelerate growth and enhance business and client outcomes. For more information, please visit www.connectuswealth.com.

Cautionary Statement Concerning Forward-Looking Statements

This release contains certain forward-looking statements that reflect Focus' current views with respect to certain current and future events. These forward-looking statements are and will be, subject to many risks, uncertainties and factors relating to Focus' operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to Focus on the date of this release. Focus does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Focus may be found in Focus' filings with the Securities and Exchange Commission.

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