

## **LLBH Private Wealth Management Surpasses \$1 Billion in Client Assets**

*Firm Doubles in Size in Less than Five Years*

WESTPORT, CT, May 8, 2013 – LLBH Private Wealth Management (LLBH), an independent Registered Investment Advisory firm offering a full range of family office and wealth management services to families across the country, announced today that it has eclipsed \$1 billion in client assets. Based in Westport, Connecticut, with an established presence in both Southern California and Greenwich, Connecticut, the firm has doubled its assets since its formation four and a half years ago. LLBH's growth is a product of the firm's continued expansion in key markets and its commitment to providing its ultra-high-net-worth clients with innovative investment strategies, detailed and creative financial planning, and extraordinary client service.

"Being independent has allowed our team to be more flexible when responding to the specific requirements of our ultra-high-net-worth clients," said Bill Loftus, partner at LLBH. "We have taken a measured approach to our growth strategy, fine-tuning the support we provide to our families by taking cues from their needs. A perfect example of this approach is our recently launched Virtual Family Office."

Managed by LLBH's experienced team, the Virtual Family Office (VFO) was conceived to address the sophisticated, but underserved, needs of ultra-high-net-worth families searching for the structure of a single family office (SFO). The offering provides clients with a solution that best addresses their financial planning requirements while still offering control, privacy, and flexibility.

"Surpassing \$1 billion is a testament to the caliber of professionals working at LLBH," explained Jim Pratt-Heaney, partner at LLBH. "This milestone reflects the level of commitment with which we serve our clients. The team's dedication to providing the ultimate client experience through high-level services and access to top talent has led our firm to become a nationally established independent RIA."

Haley Rockwell, managing director, is the most recent addition to the LLBH team. Having joined in January, she is helping launch a women's initiative featuring a series of events designed to foster greater investing wherewithal among women and empower them to make educated financial decisions. The local initiative will launch in Connecticut this June.

Partners, Jim Pratt-Heaney, Bill Loftus, Kevin Burns and Bill Lomas, left Merrill Lynch's Private Banking and Investment Group in 2008 to established LLBH through Focus Connections, a program run by Focus Financial Partners that helps brokers transition from wirehouses to independent RIAs. Since then, the firm has added several positions, growing to 12 total employees.

**About LLBH Private Wealth Management**

Based in Westport, Connecticut, LLBH Private Wealth Management is an independent Registered Investment Advisor offering a full range of wealth management and family office services to wealthy families across the country. Led by a team of experienced financial advisors, the firm specializes in investment strategy and management, active tax management, estate planning and trust services, philanthropic planning and family office services. More information about the firm can be found at [www.llbhprivatewealthmanagement.com](http://www.llbhprivatewealthmanagement.com).

**About Focus Financial Partners**

Founded in 2006, Focus Financial Partners, LLC, is the leading international partnership of independent, fiduciary wealth management firms. Focus provides wealth management, benefit and investment consulting services to individuals, families, employers and institutions. Clients benefit from Focus' independence, as well as unrivaled access and continuity. Focus principals maintain their entrepreneurial independence, benefit from the synergies, scale, economics and best practices of the market leader and achieve an eventual, smooth ownership transition. Focus was included on Inc. magazine's 5000 ranking of the nation's fastest-growing private companies in 2011 and 2010. In 2012, Focus was named a Crain's New York Business "Fast 50" growth firm in New York City. For more information, please visit [www.focusfinancialpartners.com](http://www.focusfinancialpartners.com).

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