

The Colony Group Recognized as a Leading Independent Advisory Firm

- Michael Nathanson a Finalist for the Invest in Others Community Leadership Catalyst Award

Boston, MA – August 4, 2016 – The Colony Group and its executives again have been included in several notable industry rankings throughout the first part of 2016. The firm has experienced marked growth in both assets under management and revenue over the past 5 years, garnering recognition from the following publications:

- *Financial Times*: For the third consecutive year, The Colony Group has been named to the *Financial Times* 300 Top Registered Investment Advisers list, as announced at a celebratory event held in New York City in June. The list recognizes top independent RIA firms from across the U.S.
- *Financial Advisor*: In the July issue of *Financial Advisor* magazine, The Colony Group was ranked among the 50 fastest growing registered investment advisors in the country as well as one of the 50 largest RIAs by total assets under management. This is the firm's second appearance in the list of fastest growing firms and its tenth appearance in the RIA ranking.
- *Boston Business Journal*: Again recognized for its growth, The Colony Group was ranked among the Fastest Growing Private Companies in Massachusetts by the *Boston Business Journal* for the second consecutive year.

"We are proud of all of these accolades. As we celebrate our 30 years of meaningful journeys with clients, we hope and intend to continue delivering the exceptional experience that they expect and deserve," said Stephen Stelljes, President of Client Services for The Colony Group.

In addition to these recognitions, it was announced in *InvestmentNews* that The Colony Group's Chairman & CEO, Michael Nathanson, was named as one of three finalists for the Invest In Others Community Leadership Catalyst Award for his work as the Chairman of the Board for the National Brain Tumor Society. The annual award is presented to an advisor who has been an active stimulus for positive change and displayed entrepreneurial vision and leadership to a non-profit organization.

"Michael Nathanson is an inspirational leader, whose vision, innovation, sound judgement, and hard work has helped our organization succeed in so many countless ways," stated David Arons, Chief Executive Officer at the National Brain Tumor Society. "His deep passion for our mission is evident in everything he does for us. As our Board Chair, Michael has helped raise funds for critical research and drives our governance structure and strategic agenda. And even more important, he is a generous, trusted friend to our staff, our donors and volunteers, our Board members, and the entire brain tumor community. We congratulate Michael on this wonderful honor."

Ranking Criteria

The Colony Group was one of sixteen Massachusetts-based firms to be named in the *Financial Times* state-by-state list of elite RIAs with at least \$300M of assets under management (AUM). More than 1,500 pre-screened RIA firms were invited to apply for consideration, based on their AUM. Applicants that applied were then graded on six criteria: AUM; AUM growth rate; years in existence; advanced industry credentials of the firm's advisors; online accessibility; and compliance records. Colony was ranked 21st on the *Financial Advisor* list of the "Top 50 Fastest Growing Firms" based on percentage

growth in AUM from 2014-2015. The Colony Group was ranked 37th on *Financial Advisor's* 2016 RIA ranking by total AUM. To be eligible for the *Financial Advisor* rankings, firms must have at least \$50 million in AUM as of December 31, 2015. In the *Boston Business Journal's* Fastest-Growing Private Companies in Massachusetts list, Colony was ranked 64th among 76 Massachusetts-based companies based on revenue growth from 2012-2015. The Colony Group did not pay a fee for inclusion on any of these lists.

Finalists for the Invest In Others Catalyst Award are selected based on an advisor's leadership, dedication, contribution, inspiration, and impact on a non-profit and the community it serves. Award finalists receive a \$5,000 donation to their designated charities.

About The Colony Group, LLC

The Colony Group is an independent, fee-only, financial advisory firm with over \$5 billion in assets under management and approximately 90 employees in offices in Massachusetts, New York, Virginia, and Florida. Founded in 1986, The Colony Group provides high-net-worth individuals and families, corporate executives, professionals, and institutions with deep expertise that goes beyond investment management and can encompass the full suite of wealth management services, including tax, estate, retirement, and philanthropic planning, asset allocation, and cash and risk management. For more information, please visit www.thecolonygroup.com.