The Colony Group

The Colony Group Names Four New Principals
-Company Bolsters Leadership of Financial Advisory and Institutional Consulting Practices

Boston, MA – May 17, 2017 - The Colony Group, LLC, a financial advisory and institutional consulting company with over $5.5 billion in assets under management, announced the promotion of Timothy Jester, CAIA®, AIF®; Jeremy Kuhlen, CFP®, CRPS®, AIF®; Bill Weydemeyer, MBA, CFP®; and John White, MBA, CFA, to Principals. With the addition of these four individuals, the company's leadership team now includes 36 Principals. This news is announced following the successful merger of Denver-based Jones Barclay Boston into The Colony Group and the addition of Ian Barclay and Craig Jones as Co-Presidents of the company's sports and entertainment practice.

"Our clients expect us to attract, develop, engage, and retain the best people in the industry, and we believe that the elevation of these exemplary individuals reflects our commitment to meeting those expectations," said Michael Nathanson, Chairman and CEO of The Colony Group.

- Tim Jester is a Director of the firm's Institutional Advisory Practice and a Senior Investment Counselor. He has over 30 years of experience in institutional investment services and has earned the Accredited Investment Fiduciary® and Chartered Alternative Investment Analyst® professional designations. Tim holds a BS from Shorter College and an MS from Georgia Tech.

- Jeremy Kuhlen is a Senior Financial Counselor at the firm who works closely with private high-net-worth clients to align their lives with their wealth. He is a CERTIFIED FINANCIAL PLANNER™ practitioner, a Chartered Retirement Plans Specialist℠, and an Accredited Investment Fiduciary®. He is a graduate of James Madison University and received his Certificate in Financial Planning from Boston University. Jeremy was also recently named a 2017 Five Star Wealth Manager in Richmond Magazine.

- Bill Weydemeyer is a Senior Financial Counselor at the firm and possesses extensive expertise in serving both private high-net-worth clients as well as executives in the company's corporate counseling program. Bill earned his BA from Hamilton College and his MBA from Northeastern University and is a CERTIFIED FINANCIAL PLANNER™ practitioner.

- John White serves as the firm's Chief Administrative Officer. He provides broad investment industry experience in areas including firm operations and business management, investment strategy, portfolio management, trading, research, compliance, relationship management, marketing, and technology. John earned his BS from Bucknell University and his MBA from the University of Richmond and holds the Chartered Financial Analyst® designation.

About the Five Star Wealth Manager Award

Five Star Professional conducted research to find wealth managers, CPAs, and estate planning attorneys that have a proven record of excellence in client service. The list of Five Star Wealth Managers was compiled in

various regions throughout the country, with candidates evaluated on five required criteria: 1. Credentialed as an investment advisory representative or a registered investment advisor; 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years; 3. Favorable regulatory and complaint history review; 4. Fulfilled their firm review based on internal firm standards; and 5. Accepting new clients. Five additional eligibility criteria are also considered: 1. One-year client retention rate; 2. Five-year client retention rate; 3. Non-institutional discretionary and/or non-discretionary client assets administered; 4. Number of client households served; and 5. Education and professional designations. Five Star Professional also contacted potential consumers of wealth management services to uncover positive and negative experiences, which were factored into the nomination process. From these nominees, a panel chose the ultimate recipients.

About The Colony Group, LLC

The Colony Group is an independent, fee-only financial advisory firm with over $5.5 billion in assets under management and approximately 100 employees in offices in Massachusetts, New York, Virginia, Florida, and Colorado. 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 financial counseling services, including tax, estate, retirement, and philanthropic planning, asset allocation, and cash and risk management. For more information, please visit www.thecolonygroup.com.