

The Colony Group Expands West, Merging With Denver-Based Jones Barclay Boston

- *Colony Reaches \$5.5 Billion in Assets Under Management and Nears 100 Employees with the Addition of a Professional Athlete and Entertainment Practice*

Boston, MA & Denver, CO – January 17, 2017 – The Colony Group today announced that Denver-based Jones Barclay Boston (JBB) has merged with the firm. The Denver location will be Colony’s seventh office, its first in the west. The addition of JBB, led by Ian Barclay and Craig Jones, brings deep and tenured expertise managing the wealth of active and retired professional athletes. Joining Colony is expected to bring enhanced services to JBB’s existing clients while helping to grow the national Sports and Entertainment practice.

The firms have long admired each other and shared similar values, from acting as fiduciaries and putting client interests first to engaging and developing top talent. “We are delighted to have the Jones Barclay Boston team join us so that together we can take advantage of our complementary business strengths. This merger brings us key talent in a new geography and allows us to launch what we believe will be a best-in-class professional athlete and entertainment practice, led by our new Co-Presidents, Ian Barclay and Craig Jones. In turn, we believe that we can assist our Denver-based colleagues through our capabilities and deep expertise as well as our legacy of serving corporate executives, professionals, entrepreneurs, and other high-net-worth clients and institutions,” shared Michael Nathanson, Colony’s Chairman & CEO.

“We spent considerable time assessing our clients’ needs and our desire to continue to enhance their experience, particularly as our clients move through their active professional, managerial, and entrepreneurial careers and beyond,” explained Craig Jones, Managing Director, Rocky Mountain Region and Co-President, Colony Sports and Entertainment. “The Colony Group emerged as the obvious choice for us, given our shared culture and values. Colony continues investing in the talent and technology that

we believe our clients expect and deserve. I personally look forward to continuing to deliver the tailored service of a boutique advisory firm, supported by the infrastructure of a national firm.”

In addition to its athletic and entertainment clients, the Denver team also serves a growing client base of corporate executives, professionals, and entrepreneurs. Jones continued, “Over time we look forward to expanding our investment platform and financial advisory capabilities for our clients, which include corporate executives, business owners, attorneys, retirees, and others, as we guide them through complex career and life transitions.”

Eight of Jones Barclay Boston’s team members will remain in the Denver office, with the firm’s name changing to The Colony Group. Partner Mike Boston has decided to make a career change and will transition out of the business. He will remain through a transition period, serving as both a consultant and an advocate for the firm that he helped launch before embarking on his new career.

- Ian Barclay, CPA, PFS, Managing Director, Rocky Mountain Region and Co-President, Colony Sports and Entertainment. Barclay brings deep experience, particularly in international tax and financial counseling, to his clients, developed from years of experience at Clarkson Gordon (now Ernst & Young) and Price Waterhouse prior to launching his own CPA firm and later Jones Barclay Boston. He studied at the Graduate Tax Program at the University of Denver School of Law and McGill University. Barclay is a founding Board Member of the Canada-Colorado Association and a former Board Member and Treasurer of the Denver Athletic Club.
- Craig Jones, JD, CPWA®, MBA, Managing Director, Rocky Mountain Region and Co-President, Colony Sports and Entertainment. Jones developed a broad and dynamic background in finance, tax, and strategic planning from his experiences at Mellon Bank, PepsiCo, Price Waterhouse, and EW Scripps. He co-founded JBB along with Ian Barclay and Mike Boston over 22 years ago. He earned a JD and MBA from Case

Western Reserve University and a BS in Economics from Allegheny College. Jones is an alumnus of the Leadership Denver Foundation, a member of the Denver Metro Chamber of Commerce, a member of Sigma Pi Phi (The Boule), and a member of Vistage International. His past board memberships include Denver Metro Chamber Foundation, American Red Cross Mile High Chapter, I have a Dream Foundation, and Senior Housing Options.

About The Colony Group, LLC

The Colony Group is an independent, fee-only, financial advisory firm with approximately \$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, athletes, professionals, entrepreneurs, 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.