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Newly Formed Florida-Based $1.4 Billion Omnia Family Wealth Launches as One of the Leading Independent Multi-Family Offices in U.S.

Multi-Generational Wagner Family Works With Multi-Generational Families

NEW YORK, NY, September 8, 2015 – Dynasty Financial Partners today announced its partnership with Omnia Family Wealth, the most recent independent investment advisory firm to leverage Dynasty Financial Partners' industry-leading platform of integrated wealth management services and technology.

Based in Aventura, Florida, Omnia Family Wealth is a multi-family office founded by former Merrill Lynch Private Wealth Advisors Steven and Michael Wagner. Joining them at Omnia Family Wealth are Co-Founder, Managing Director, Wealth Structure and Planning, Ivan Hernandez; Director of Client Services, Diana Torre and Director of Operations, Cherie Cohen - all from Merrill Lynch. The team had worked together for years at both Merrill Lynch and UBS. Steven Wagner had been a leading advisor of Merrill Lynch's Private Bank and Investment Group.

"Omnia was formed for a simple reason: we want to offer our clients family office capabilities – in effect, a higher end, more personal level of service in a conflict-free environment," said Steven Wagner, Co-Founder and CEO of Omnia Family Wealth. "At Omnia, we believe that there is a great opportunity to expand our business in Florida, North Carolina and other states as families seek a family office approach to managing their wealth. These families want to align their values and vision with their financial plans."

"Omnia Family Wealth was built around our desire to deliver independent, integrated and comprehensive wealth management advice and planning solutions to the families we serve. Our clients are notable for their expertise at creating and accumulating wealth. They're dedicated to their families and to building businesses, shaping their communities and creating meaningful legacies," said Mr. Wagner.

As a multi-family office, Omnia Family Wealth works with clients on a broad array of financial activities - from wealth structuring to transference to creating a philanthropic legacy. The firm takes a holistic approach: extending relationships to clients' family members and seeking to understand clients' core values and beliefs in addition to their risk preferences and financial goals. Omnia offers an intergenerational perspective focused on clients' long-term objectives. At the same time, clients are assured of a sense of continuity, as the firm will remain within the family for the next generation. This multi-family office was built with the mission to help these families manage the complexity and responsibility of their wealth.

"The Omnia Family Wealth team consists of advisors who have built a remarkably successful family-based business with a deep connection to their Florida community. With their newly launched firm, we expect they will have even greater success," said Shirl Penney, President and CEO of Dynasty Financial Partners. "Dynasty is looking forward to partnering with Steven, Michael, Ivan and their team."

According to Tim Bello, Director of Network Development at Dynasty, “Steven and Michael represent the best attributes of a father-son advisory team – they are planning for the future of their firm and also taking care of their clients -- by having a built-in succession plan.”

Dynasty crafted a customized platform for Omnia Family Wealth which includes Dynasty's groundbreaking investment platform. Omnia Family Wealth has selected both Fidelity and Pershing for custody services. For more information, please visit www.omniawealth.com.

Biographies

Steven Wagner

<u>Co-Founder, CEO</u>

Steven Wagner is Co-Founder and CEO of Omnia Family Wealth. With more than 35 years of experience and investment insight, Mr. Wagner guides individuals, families and private foundations through the strategic process of identifying their goals, investment profile and ultimate wealth management plan. He draws on deep analytical acumen and a nuanced grasp of the markets to support the firm’s investment strategies. Before co-founding Omnia Family Wealth, Mr. Wagner was a Managing Director at Merrill Lynch’s Private Banking and Investment Group. Prior to Merrill Lynch, he was a Managing Director of UBS Private Wealth Management. In recognition of his accomplishments, Mr. Wagner was honored as one of Barron's prestigious “Top 1,200 Financial Advisors” in 2015. Barron's also acknowledged him in its annual state-by-state ranking of the “Top 1,000 Financial Advisors in America” in 2011, 2012, 2013, 2014 and 2015.

Long active in his community, Mr. Wagner currently serves on both the board and investment committees of the Greater Miami Jewish Federation. He has also served on the boards and investment committees of the Miami Jewish Home and Hospital for the Aged, and the Make-A-Wish Foundation of South Florida.

Michael Wagner, CFP®

Co-Founder, Managing Director - Investment Management

Michael Wagner CFP® is a Co-founder and Managing Director - Investment Management at Omnia Family Wealth. In this position, he is responsible for the ongoing analysis of client portfolios as well as implementation of the Firm's reporting platform. His responsibilities also include participating in the Firm's investment committee, where he assists in manager selection, analysis and risk management. Mr. Wagner works closely with Omnia's younger clientele and functions as the firm's Chief Technology Officer.

Prior to joining Omnia Family Wealth, Mr. Wagner spend several years working with the team as a Private Wealth Advisor at Merrill Lynch. He was also a Financial Advisor at UBS Private Wealth Management, where he served clients and helped design investment strategies.

Mr. Wagner received his B.A. in Economics from Brandeis University. He holds the CFP® certification awarded by the Certified Financial Planner Board of Standards, Inc. He is heavily involved with the Greater Miami Jewish Federation (GMJF) where he sits on several committees. He is currently serving a two-year appointment as Co-Chair of The Network, GMJF's young leadership board, where he also has a seat on the Board of Directors. He was a 2014 recipient of the Sandra C. Goldstein Young Leadership Award, an honor presented annually to two individuals between the ages of 25 and 35 for leadership and service to Miami's Jewish community.

Ivan Hernandez, CAP®, CFP®, CIMA®

Co-Founder, Managing Director - Wealth Structure and Planning

Mr. Hernandez has provided wealth management services to ultra high-net-worth clients for 20 years, first with a boutique fixed income firm and, most recently, as a Senior Financial Analyst with Merrill Lynch's Private Banking and Investment Group. From 1998-2009, he worked closely with significant clients at UBS Private Wealth Management. As Managing Director- Wealth Structure and Planning, he has a passion of helping family members understand and implement philanthropic and wealth transfer strategies; he also works closely with clients' tax and legal professionals on effective techniques and tailored structures to help realize these goals. Mr. Hernandez holds the CFP® certification awarded by the Certified Financial Planner Board of Standards, Inc. He is also a Chartered Advisor in Philanthropy® (CAP®) and a Certified Investment Management Analyst professional (CIMA®). His CIMA designation was earned at the Wharton School of Business.

Diana Torre

<u>Director of Client Services</u>

As Director of Client Services at Omnia Family Wealth, Ms. Torre is charged with building trusted and solid relationships with the Firm's clients. She has worked with her Omnia colleagues for close to ten years, both as a Senior Private Wealth Associate at Merrill Lynch's Private Banking and Investment Group and as a Senior Client Service Associate at UBS Private Wealth Management. She brings a long tradition of client service to her role, having spent 13 years at Morgan Stanley as a Senior Client Service Associate. A graduate of Florida International University, she hold a B.A. in Finance and International Business.

Cherie Cohen

<u>Director of Operations</u>

Ms. Cohen is Director of Operations for Omnia Family Wealth. Her main responsibility is to ensure the smooth operation of the business. She has worked with her Omnia colleagues for more than ten years. For Merrill Lynch's Private Banking and Investment Group, she served as a Senior Private Wealth Associate; at UBS Private Wealth Management, she was a Senior Client Service Associate. She has also worked at a small investment firm in Coral Springs, FL. where she was an advisor and long-term care specialist.

About Dynasty Financial Partners

Dynasty Financial Partners is the premiere integrated platform for the wealth management industry's top advisors. Dynasty develops, sources and integrates wealth management capabilities, solutions and technology into its open-architecture platform to help independent advisors protect and grow their clients' wealth. Dynasty's core principle is "objectivity without compromise," and the firm is committed to crafting solutions that allow investment advisors to act as true fiduciaries to their clients. For more information, please visit www.dynastyfinancialpartners.com and follow us on Twitter @DynastyFP