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New York-Based $900 Million Wealth Management Team Launches Fusion Family Wealth as an Independent Investment Firm

New Firm is 'Trusted Advisor to Trusted Advisors' with Collaborative Relationships with Leading Accounting and Law Firms

NEW YORK, NY, November 12, 2013 – Dynasty Financial Partners today announced its partnership with Fusion Family Wealth LLC, the most recent independent investment advisory firm to leverage Dynasty Financial Partners' industry-leading platform of integrated wealth management services and technology.

With offices in both New York City and Long Island, NY, Fusion Family Wealth is an investment management firm founded by former UBS Senior Vice President Jonathan Blau. Joining Mr. Blau at Fusion Family Wealth are Managing Director Harvey Radler and Senior Wealth Advisors Jeffrey Blick and Joel Bodner and Senior Client Service Specialist James Cloudman- all joining from UBS.

"Fusion Family Wealth was formed for a simple reason: we recognized that clients expect a high level of professional care aligned with the highest legal fiduciary standard. As an SEC registered firm, we are able to fuse these two concepts together," said Mr. Blau, President and CEO of Fusion Family Wealth. "At Fusion, we are committed to offering the highest standard of care to individual clients and professional services clients. This is possible through Dynasty's open-architecture platform of best-in-class resources. All of our clients benefit from the scale of the Dynasty Network. In addition, we now have the flexibility to work strategically with large accounting and law firms in handling a wider array of financial capabilities."

Behavioral finance is an important aspect of Mr. Blau's business and he brings a fresh perspective and clarity on his work with clients. Behavioral finance takes the position, supported by extensive research, that emotion and psychology adversely influence investor's financial decisions. Emotion and psychology cause individuals to behave in unpredictable ways, which many times may reduce, the probability of achieving their goals. "Individual investors tend to have an emotional bias and have the illusion of predictive value. The idea that because we think something will happen, that thought somehow has predictive value as to the eventual outcome. I work with my clients on viewing investing from a broader, more rational perspective," said Mr. Blau.

Dynasty crafted a customized platform for Fusion Family Wealth, which includes Dynasty's groundbreaking investment platform integrating industry-leading proprietary research from Wilshire Associates and Callan Associates and Envestnet's state-of-the-art portfolio tools and reporting technology. Fidelity Institutional Wealth Services LLC will provide clearing and custody services.

“Fusion Family Wealth offers its clients an innovative business model. Jonathan is the ultimate entrepreneur and independent thinker and we are proud to add Jonathan and the team to our network of independent advisors," said Shirl Penney, President and CEO of Dynasty Financial Partners. "Over the years, Jonathan has built a substantial network of accounting and legal professionals and has successfully collaborated with a wide center of influence in building his business. Now, more opportunities will present themselves to Fusion Wealth as independent advisors and they will be able to deliver a wider solution set to clients.”

Jonathan R. Blau

Mr. Blau is the President and CEO of Fusion Family Wealth, a financial advisory firm he founded in November, 2013. Behavioral finance is an important aspect of Mr. Blau's business and he brings a fresh perspective and clarity on his work with clients. Mr. Blau has more than two decades experience acting as a 'trusted advisor to trusted advisors' with deep experience working with accounting and law firms on a wide array of financial services capabilities including 401ks for accounting and law firms. He has held a series of increasingly senior positions in the investment industry. In recent years, he worked as a senior advisor at Sanford C. Bernstein & Co., Inc., Morgan Stanley and UBS. Mr. Blau holds two Advanced degrees from Fordham University – an MS in Taxation and an MBA in Accounting.

Harvey L. Radler

Mr. Radler is Managing Director of Fusion Family Wealth. In this role, Mr. Radler works with a targeted group of high net worth investors managing their investment portfolios. He has over 40 years experience in the investment management business. He began his career at Wertheim & Co./Schroders. He then moved to Prudential where he became CEO and Chief Investment Officer of Gibralter Advisors (Prudential Securities Co, Inc.). In 1996, Mr. Radler joined Sanford C. Bernstein & Co., Inc. After that, he moved to Morgan Stanley in 2000 and then joined UBS in 2008. In addition, he spent 25 years on the disciplinary panel of the NYSE.

Jeffrey S. Blick

Mr. Blick is a Senior Wealth Advisor at Fusion Family Wealth. He works closely with attorneys and accountants on tax and legal aspects of client's wealth management plans. He began his career in the tax practice at Arthur Anderson LLP. In 1998, he joined Merrill Lynch as in-house tax counsel and then joined the Blau/Radler Group at Morgan Stanley in 2000. Mr. Blick worked at UBS for six year starting in 2008. He holds a B.S. in Accounting from the State University of New York at Albany, a J.D. from Hofstra University and an LL.M. in Taxation from New York University.

Joel S. Bodner

Mr. Bodner is a Senior Wealth Advisor at Fusion Family Wealth where he works with clients on researching and managing investment opportunities. He joined Fusion Family Wealth from UBS where he worked since 2008. He began his career in investment management at Merrill Lynch in 2002. He received his B.S. from Touro College, NY majoring in finance with a concentration in computers. He holds an MBA in finance from Baruch's Zicklin School of Business in New York

City.

James F. Cloudman, Jr.

Mr. Cloudman is a Senior Client Service Specialist at Fusion Family Wealth. He previously worked as a Financial Advisor at UBS Financial Services Inc., where he joined in 2010. He has BA from SUNYBinghamton and his MBA from University of Texas, Houston.

About Fusion Family Wealth

With offices in New York City and Long Island, Fusion Family Wealth provides investment management services to leading accounting and law firms, ultra high net worth, family office, and institutional clients. Fusion specializes in investment management, 401k accounts and insurance. The firm offers its clients true open architecture, where everything from asset custody to execution is tailored to the client's specific needs, requests and risk tolerance, with competitive pricing unavailable through normal channels.

About Dynasty Financial Partners

Dynasty Financial Partners develops, sources and integrates the finest wealth management capabilities for the industry's leading independent investment advisor teams. Dynasty offers a customized open-architecture platform of wealth management solutions and technology 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.