

**Focus Financial Partners, LLC - Strategic SWOT Insights - A 360 Review of Opportunities, Challenges and Risk, Corporate and ESG Strategies, Competitive Intelligence and Operational KPI's, and Recent Trends**

Company Report | 2025-06-20 | 57 pages | Quintel Research

**AVAILABLE LICENSES:**

- Single User Price \$150.00
- Multi User Price \$175.00
- Enterprise User Price \$195.00

**Report description:**

Report Summary

Focus Financial Partners, LLC - Strategic SWOT Insights - A 360 Review of Opportunities, Challenges and Risk, Corporate and ESG Strategies, Competitive Intelligence and Operational KPI's, and Recent Trends is a comprehensive and easily accessible overview of Focus Financial Partners, LLC 's business operations. It provides a detailed analysis of the company's strategic standing, as well as its position in the industry compared to competitors. The report includes several key features to facilitate decision-making and provide insights into the company's performance.

The report begins with in-depth information about Focus Financial Partners, LLC including key insights, business segments, key executives, locations, products and services, historical events, corporate strategy, and management discussions. This section provides a solid foundation for understanding the company's key attributes.

Next, the report assesses Focus Financial Partners, LLC's strategic standing through various analyses. The ESG spotlight evaluates the company's environmental, social, and governance performance, providing insights into its sustainability efforts and ethical practices. The SWOT analysis examines the company's internal strengths and weaknesses, as well as external opportunities and threats. By integrating these strategic analyses, the report offers a comprehensive understanding of Focus Financial Partners, LLC's overall strategic standing and supports informed decision-making and strategic planning.

Finally, the report includes recent news and deal activities undertaken by Focus Financial Partners, LLC enhancing awareness of the company's business trends, growth perspectives, and more.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Key Highlights

Focus Financial Partners Inc. is a private U.S.-based company that specializes in wealth management and related financial services. Established in 2004, the company was founded by Rudy Adolf, Rajini Kodialam, and Lenny Chang. Its headquarters is located in New York City. Focus Financial Partners operates through a network of independent, fiduciary wealth management firms, primarily serving high-net-worth individuals and families.

The company provides a range of services, including wealth management, asset management, business management, and financial planning. Focus Financial Partners has expanded its geographic presence across the United States, Canada, Australia, and the United Kingdom, making it an international player in the financial services industry.

In 2023, Focus Financial Partners transitioned from a public to a private company, having been acquired by funds affiliated with Clayton, Dubilier and Rice and Stone Point Capital. Despite this change in ownership, the company continues to operate with the same focus on delivering personalized financial services to its clients.

### Focus Financial Partners, LLC in the News:-

- 28-Oct-2024 - Greg Woods Joins Focus Financial Partners as General Counsel; Focus Bolsters Legal Team with Three Senior Promotions
- 03-Oct-2024 - Fort Pitt Capital Group to Join Kovitz
- 26-Sep-2024 - Custom Portfolio Group to Join Transform Wealth
- 21-Aug-2024 - Goldman & Knell to Join Focus Partner Firm Gelfand, Rennert & Feldman, Furthering Gelfand's Status as a Leader in the Business Management Industry
- 08-Aug-2024 - Flynn Family Office Celebrates 10th Anniversary

## Scope

- **Tactical Analysis:-** Various strategic frameworks to gain insights into a Focus Financial Partners, LLC's competitive position and operational environment. These analytical tools assist in identifying competitive advantages, potential risks, and areas for improvement and efficiency, enabling companies to make informed tactical decisions.
- **Business Strategy:-** Contributes to shaping the Focus Financial Partners, LLC's overall direction, goals, and decision-making processes, ensuring long-term success and alignment with stakeholder expectations.
- **Company Fundamentals:-** These fundamentals offer valuable insights into the Focus Financial Partners, LLC's history, operations, leadership, and geographical presence, aiding in a comprehensive understanding of the organization.
- **Competitive Landscape:-** An identification of the Focus Financial Partners, LLC's main competitors, providing insights into the competitive landscape it operates in.

## Reasons to Buy

- Comprehensive Understanding of the Focus Financial Partners, LLC's internal and external factors through SWOT analysis and Corporate Strategy.
- Strive Strategic Decision Making with various analyses and identifying potential customers and suppliers.
- Mitigate Risk with help of thorough analysis of internal and external factors. Furthermore, develop strategies and contingency plans to address these challenges and minimize their impact on business operations.
- Competitive Benchmarking will help to gain a competitive advantage by understanding industry trends, customer preferences,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

and best practices.

- Valuable insights from the report enable investors and partners to make informed decisions regarding potential Collaborations, Investments, or Partnerships with the company.

Additionally, available deep-dive analysis on the company Focus Financial Partners, LLC:

- Focus Financial Partners, LLC PESTLE Analysis
- Focus Financial Partners, LLC Value Chain Analysis
- Focus Financial Partners, LLC Porter's Five Forces Analysis
- Focus Financial Partners, LLC VRIO Analysis
- Focus Financial Partners, LLC BCG Analysis
- Focus Financial Partners, LLC Segmentation, Targeting and Positioning (STP) Analysis
- Focus Financial Partners, LLC Ansoff Matrix Analysis

## **Table of Contents:**

Table of Contents

Table of Contents 2

Tables 4

Charts 5

Focus Financial Partners, LLC - Key Company Facts 6

Focus Financial Partners, LLC - Company Description 7

Focus Financial Partners, LLC - Top Executives 8

Focus Financial Partners, LLC - Head Office & Locations 9

Head Office - Country 9

Key Joint Ventures 10

Focus Financial Partners, LLC - Products and Services 11

Services 11

Focus Financial Partners, LLC - Historic Events 12

Focus Financial Partners, LLC - Corporate Strategy 13

Focus Financial Partners, LLC - Business Description 15

Wealth Management Services Segment 15

Family Office Services Segment 16

Other Ancillary Services Segment 16

Focus Financial Partners, LLC - ESG Spotlight 17

Environment 17

Social 18

Corporate Governance 18

Focus Financial Partners, LLC - SWOT Analysis 19

Overview 19

Strengths 21

Weaknesses 23

Opportunities 25

Threats 27

Competing Players 29

Snapshot of Competing Players 30

Northern Trust Corporation 30

Key Company Facts 30

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Company Description	30
Key Financials	31
Share Price Trend - Jan-2024 to Jun-2025 (Average Share Closing Price)	31
Key Financial Ratio Analysis	36
Robert W. Baird & Co. Private Wealth Management	37
Key Company Facts	37
Company Description	37
Fiduciary Trust Company International	38
Key Company Facts	38
Company Description	38
Aspiriant, LLC	39
Key Company Facts	39
Company Description	39
Cresset Wealth Advisors, LLC	40
Key Company Facts	40
Company Description	40
Focus Financial Partners, LLC - In the News	41
28-Oct-2024- Greg Woods Joins Focus Financial Partners as General Counsel; Focus Bolsters Legal Team with Three Senior Promotions	41
03-Oct-2024- Fort Pitt Capital Group to Join Kovitz	43
26-Sep-2024- Custom Portfolio Group to Join Transform Wealth	44
21-Aug-2024- Goldman & Knell to Join Focus Partner Firm Gelfand, Rennert & Feldman, Furthering Gelfand's Status as a Leader in the Business Management Industry	45
08-Aug-2024- Flynn Family Office Celebrates 10th Anniversary	46
05-Aug-2024- HoyleCohen to Join The Colony Group	47
.31-Jul-2024- Focus Financial Partners Promotes Travis Danysh to Chief Corporate Development Officer	48
16-Jul-2024- Gratus Capital to Join The Colony Group	49
01-Jul-2024- Relative Value Partners to Join Kovitz	50
10-Jun-2024- Focus Financial Partners Further Strengthens Leadership Team With Four Key Executive Appointments	52
Appendix	54
Definitions	54
SWOT Analysis	54
PESTLE Analysis	54
Value Chain Analysis	54
ESG Spotlight	54
Research Methodology	55
Disclaimer	56
Contact Us	56

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Focus Financial Partners, LLC - Strategic SWOT Insights - A 360 Review of Opportunities, Challenges and Risk, Corporate and ESG Strategies, Competitive Intelligence and Operational KPI's, and Recent Trends**

Company Report | 2025-06-20 | 57 pages | Quintel Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User Price	\$150.00
	Multi User Price	\$175.00
	Enterprise User Price	\$195.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Signature

An empty rectangular box with a thin black border, intended for a signature.