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Media contact:
Krystan Krailler, Scooter Media
krystan@scootermediaco.com | (513) 257-7262

Bartlett Wealth Management Announces Strategic Deal with Chicago Firm

Lodestar Investment Counsel to Join Bartlett

Cincinnati (May 17, 2019) – Bartlett Wealth Management LLC ("Bartlett"), a leading wealth management firm which traces its origin back more than 120 years, announced today that Lodestar Investment Counsel, LLC ("Lodestar"), based in Chicago, Illinois, has entered into a definitive agreement to join Bartlett. The transaction is expected to close in the third quarter of 2019, subject to customary closing conditions.

This transaction positions Bartlett for continued growth throughout the Midwest. Bartlett currently has a strong presence in Chicago, and the combination with Lodestar will deepen and expand both firms' client service capabilities.

"We are very pleased to welcome the Lodestar team to the Bartlett family," said Kelley Downing, President and CEO of Bartlett. "Bartlett and Lodestar share a common set of values around delivering exceptional client service and helping guide the investment process for clients," Downing continued. "With these shared values and a similar clientele, Lodestar was a great choice for Bartlett as we continue to execute on the business strategy we have had in place since joining Focus Financial Partners in 2018."

"We're excited to partner with Bartlett and enhance the multi-generational financial planning capabilities we offer our clients," said Bob Dearborn, Co-President of Lodestar. "We will also be able to provide additional investment expertise and services, as well as broaden our technology platform to better serve our clients by joining the Bartlett family. The pace of consolidation within the wealth management industry continues to accelerate and the business is highly competitive. In this environment, we must scale our business so that we can continue to deliver state-of-the-art service to our clients. Together with Bartlett, we look forward to continuing to work hard for all our clients in the future."

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ABOUT BARTLETT WEALTH MANAGEMENT

Bartlett Wealth Management ("Bartlett") is a Cincinnati-based wealth management firm, providing customized investment management and financial planning services to high net worth families, foundations and businesses. Bartlett takes pride in providing clients independent personalized fiduciary advice through a team of distinguished investment and planning professionals. For more information, visit www.Bartlett1898.com.

ABOUT LODESTAR INVESTMENT COUNSEL

Lodestar Investment Counsel, LLC (“Lodestar”) is an independent, employee-owned, registered investment adviser based in Chicago, Illinois. Since the firm’s inception in 1989, Lodestar has focused on providing independent and objective investment counsel with a high level of personal service. Lodestar’s clients include high net worth individuals, trusts, foundations, and retirement plans. For more information, visit http://www.ldstr.com.