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## **Bartlett Wealth Management Finalizes Strategic Deal with Chicago Firm**

### *Lodestar Investment Counsel Joins Bartlett*

**Cincinnati** (July 1, 2019) – Bartlett Wealth Management LLC (“Bartlett”), a leading wealth management firm which traces its origin back more than 120 years, announced today that it has completed a definitive agreement to acquire Lodestar Investment Counsel, LLC (“Lodestar”), a successful wealth management firm based in Chicago, Illinois.

The Chicago office will take on the name “Bartlett Wealth Management” and all of Lodestar’s employees will remain on the team, continuing to provide seamless service to their clients as they transition to Bartlett.

This transaction positions Bartlett for continued growth throughout the Midwest. The combined firm will benefit from broader and deeper client service capabilities. Bartlett currently has a strong presence in Illinois, with many of its client assets managed in the Greater Chicago region.

“Both Bartlett and Lodestar share a common set of values when it comes to delivering exceptional client service and helping to manage their investments,” said Kelley J. Downing, President and CEO of Bartlett.

“Our shared values and similarities in clientele made Lodestar a great choice for us as we continue to execute on the business strategy we have had in place since Bartlett joined Focus Financial Partners in 2018,” Downing said. “We are pleased to welcome the Lodestar team to the Bartlett family, maintaining an exceptional level of service to Lodestar clients, and to welcoming new clients to the combined firm.”

“Partnering with Bartlett allows us to 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 a broader technology platform to better serve our clients.”

“The wealth management industry is highly competitive, with the pace of consolidation continuing to accelerate. In this environment, we must scale our business so we can continue to deliver state-of-the-art service to clients,” said Downing. “Together with our

newest advisors in Chicago, we look forward to continuing to work hard to meet our clients' needs."

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## **ABOUT BARTLETT WEALTH MANAGEMENT**

Bartlett Wealth Management ("Bartlett") a leading Midwestern wealth management firm with offices in Cincinnati and Chicago, provides customized investment management and financial planning services to high net worth families, foundations and businesses throughout the Midwest. 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](http://www.Bartlett1898.com).