



SIGNATURE ESTATE & INVESTMENT ADVISORS, LLC®
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Signature Estate & Investment Advisors Announces Strategic Investment from Reverence Capital Partners, Announces Plan to Work with Newly Formed Broker-Dealer

Multi-faceted strategic partnership aimed at bolstering SEIA's client services across a spectrum of distribution channels, significantly increasing investor reach and impact

LOS ANGELES, CA –August 17, 2022- [Signature Estate & Investment Advisors](#) ("SEIA") today announced an equity investment from [Reverence Capital Partners](#) ("Reverence Capital"), a leading private equity firm focused on investing in financial services businesses. Consecutively ranked in the Barron's list of Top 100 Independent RIA firms, SEIA has over \$16 billion assets under management and is celebrating its 25th anniversary with a clear focus on building the leading wealth management platform of the future through this innovative series of transactions, investments, and strategic partnerships. In connection with the recapitalization, SEIA plans to work with newly formed Broker-Dealer, Signature Estate Securities.

The equity investment from Reverence Capital is part of SEIA's long-term growth and continuity strategy. The Reverence Capital partnership will provide the capital to enable SEIA to invest in the business while continuing to enhance the level of service and product offerings the firm provides.

The newly enhanced wealth management platform will allow SEIA advisors to offer RIA and Broker-Dealer services to clients through one unified platform and will result in greater access to alternative investments, elevated client-facing technology, and more comprehensive family office services.

In addition, SEIA's investment management TAMP platform, [Signature Investment Advisors](#) ("SIA"), will now be available to advisors across the independent broker-dealer and RIA community. This open-architecture distribution strategy will bring SIA to a larger advisor population enabling more clients to benefit from SEIA's unique investment management platform.

[Advisor Group](#), a portfolio company of Reverence Capital, will continue to support Signature Investment Advisors (SIA) as a strategist on their Wealth Management Platform. As part of its continued partnership with SIA, Advisor Group will provide strategic capital investment alongside Reverence Capital to support the next phase of SEIA's growth.

"Over the last 25 years we have maintained an unwavering focus on our clients," says Brian D. Holmes, President and CEO at Signature Estate & Investment Advisors. "Our

strategic partnership with Reverence Capital Partners is a significant milestone that signals our continued commitment to building a world-class wealth management platform for our clients.”

SEIA’s long-term growth strategy, vision, and plan for continuity is focused on maintaining independence, streamlining investment solutions, and continued platform enhancements for both advisors and their clients. These multi-faceted transactions allow SEIA to invest in the future of the business while continually enhancing the level of service and offerings provided.

“Brian and his team have built one of the most successful and rapidly growing firms in the RIA industry.” said Reverence Capital Managing Partner Milton Berlinski. “We are pleased to be able to partner with this tenured management team who share our vision of exceptional client service and culture. We look forward to providing the necessary capital and support to execute on SEIA’s strategic plan of accelerated organic and inorganic growth.”

Following the close of these transactions, Brian Holmes will remain the President and CEO at SEIA and SIA. The firm’s Founding Partners, Management Team, Advisor Teams, and Employees will remain in place, and the brand will remain Signature Estate & Investment Advisors. At closing, SEIA will have broader equity ownership across its partners, advisors, and employees than they did prior to the transaction.

In addition, SEIA’s commitment to philanthropy will continue forward as central to the firm’s character and culture. SEIA’s Founding Partners, Brian Holmes, Gary Liska, Mark Copeland, and Paul Taghibagi, will be pledging a \$1 million gift to the [Signature Fund for Giving](#) (“SFFG”). SFFG is the firm’s charitable foundation that helps support local underserved youth who represent tomorrow’s leaders and innovators.

The transaction is expected to close in the 3rd quarter of 2022, subject to customary regulatory and other approvals. ECHELON Partners acted as financial advisor, and Ballard Spahr LLP served as legal counsel to SEIA. Kirkland and Ellis LLP served as legal counsel to Reverence Capital Partners.

About SEIA

[Signature Estate & Investment Advisors](#), LLC® (SEIA) is a Registered Investment Advisory Firm and wealth management platform. The firm offers Investment Management and Financial Planning Services tailored to meet the unique needs of affluent investors and corporations. SEIA’s mission is to provide clients with a partnership that complements and exceeds their long-term goals and objectives.

SEIA currently services over \$16 billion in assets under management. The firm has 39 advisors, 160 total employees, 12 offices, and works with clients nationwide.

About Reverence Capital Partners

Reverence Capital Partners is a private investment firm focused on thematic investing in leading global, middle-market Financial Services businesses through control and influence oriented investments in 5 sectors: (1) Depositories and Finance Companies, (2) Asset and Wealth Management, (3) Insurance, (4) Capital Markets, and (5) Financial Technology/Payments. The firm was founded in 2013 by Milton Berlinski, Peter Aberg, and Alex Chulack, who collectively bring over 100 years of advisory and investing experience across a wide range of financial services sectors. For more information, please visit www.reverencecapital.com.

Media Contact

FiComm Partners

seia@ficommpartners.com