



WMS Partners Welcomes TRIA Capital Partners as a Minority Shareholder

WMS Partners (“WMS”), a \$5 billion multi-family office focused on wealth planning and investing in both public and private markets, is pleased to announce it has closed an investment from TRIA Capital Partners (“TRIA”) through which TRIA will become a non-controlling, minority shareholder of the firm. TRIA’s passive investment is a cornerstone of WMS’s commitment to remaining an independent, permanent firm that provides its client families with conflict-free, unbiased advice. Partnering with TRIA also enhances WMS’s ability to serve future generations of clients through improved succession planning, attracting and retaining top talent, and providing access to capital for strategic investments in the business.

“After an extensive search and much consideration, it was clear that TRIA was absolutely the right partner for WMS,” said Tim Chase, WMS co-founder and Chairman. “Their support of our long-term independence and the commitment we’ve made to clients—both current and future generations—set TRIA apart. We could not be more pleased to have them as our partner.”

“We’ve watched many of our peers sell a controlling interest in their firm,” said Martin Eby, co-founder of WMS. “With our clients, fellow shareholders, and colleagues always top of mind, we had no interest in that approach.” Added Dave Citron, co-founder of WMS, “The relationships we have with our client families run deep, and this transaction provides for the continuity they deserve.”

Jeff Hill, Senior Financial Advisor and shareholder added, “For me and my fellow second-generation shareholders, TRIA’s investment is critical to WMS maintaining its autonomy for the long-term and allowing our advisors to continue to bring objective, creative, and custom solutions to our client families each and every day.” Following TRIA’s investment, the firm also expects to welcome three additional employees as shareholders in the very near term. “Our partnership with TRIA, and the support and flexibility it provides, allows us to add new employee owners now and well into the future,” said Todd Wickwire, Chief Executive Officer of WMS.

“WMS is uniquely positioned in the market,” said Ben Robins, Co-Managing Partner of TRIA. “There are very few firms around the country capable of providing the complex estate planning and sophisticated alternative investment solutions they do, and their roster of planning and investment professionals is best in class. We’re thrilled WMS selected TRIA as their long-term partner.”

About WMS Partners

WMS Partners, a registered investment advisor with more than \$5 billion in assets under management, was founded in 1993 as a multi-family office providing an alternative for families to traditional financial services firms—independent, transparent, and aligned with clients’ interests. As a fiduciary providing fee-only services to an ever-growing circle of affluent families, WMS takes an open-architecture approach and is completely objective in the expertise it brings in wealth planning, public and private investments, and family legacy advice. Read more at: www.wms-partners.com

About TRIA Capital Partners

TRIA Capital Partners provides customized financing solutions to leading wealth management firms that require outside capital but want to remain majority owned and controlled by their employees. TRIA’s executive team is led by co-founders and Co-Managing Partners Steve Cortez, Yvonne Kanner, and Benjamin Robins. For more information visit: www.triacapitalpartners.com