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Hightower Makes Strategic Investment in Lindbrook Capital

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Bicoastal Wealth Manager with \$3.8B to Expand Client Services with Hightower

CHICAGO--(BUSINESS WIRE)--Hightower announced today that it has made a strategic investment in Lindbrook Capital, LLC, a financial planning and wealth management practice with approximately \$3.8 billion in assets under management and offices in Los Angeles, Calabasas, California, and New York City.

"We have known the principals at Lindbrook Capital for more than a decade and are excited for them to join Hightower," said Hightower Chairman and CEO Bob Oros.

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Lindbrook Capital is an independent-minded wealth management practice providing highly customized investment management and financial planning services to affluent families, individuals, foundations and endowments. The 10-person organization is led by Managing Partners Benjamin Posen and Tyler Dritz, in collaboration with Lee Samson, a partner at Lindbrook Capital.

"We have known the principals at Lindbrook Capital for more than a decade and are excited for them to join Hightower," said Hightower Chairman and CEO Bob Oros. "Under the seasoned management of Ben and Tyler, the team has built an impressive business with an attractive client base that includes some of today's top business and entertainment executives."

Lindbrook Capital marks Hightower's first strategic investment in 2025. With a range of value-added services, including a national in-house trust company and a wholly owned CPA practice, Hightower provides its advisors with the resources to better align with client needs and offers the next phase of growth and support for their practices.

"We thought long and hard about our options and determined Hightower is the right partner. We aren't interested in being a serial acquirer and we had to preserve the culture and investment autonomy that our clients expect from Lindbrook," Posen said.

"In Hightower, we found a partner that could help us streamline non-core functions and created a path for us to be meaningfully rewarded as our clients grow along with us," Dritz said.

In the transaction, Lindbrook was advised by Colchester Partners LLC and Kirkland & Ellis, LLP provided legal counsel. For Hightower, McDermott, Will & Emery LLP provided legal counsel.

The nationwide Hightower advisor community now comprises more than 140 advisory businesses in 35 states and the District of Columbia. Hightower offers a wide range of services for accelerating organic growth, including business development consulting, leadership and team development, talent acquisition, marketing support, technology, investment management resources, compliance, accounting, payroll, and human resources. Advisory groups that partner with Hightower also receive access to inorganic growth services such as sourcing, valuation, deal structuring, due diligence, legal and regulatory, pre- and post-close integration, and capital resources for M&A transactions. As of Dec. 31, 2024, assets under management (AUM) for Hightower and its affiliates were approximately \$168 billion. Learn more about Hightower's collaborative business model at www.hightoweradvisors.com.

About Hightower

Hightower is a wealth management firm that provides investment, financial and retirement planning services to individuals, foundations and family offices, as well as 401(k) consulting and cash management services to corporations. Hightower's capital solutions, operational support services, size and scale empower its vibrant community of independent-minded wealth advisors to grow their businesses and help their clients achieve their vision of "well-th. rebalanced." Based in Chicago with advisors across the U.S., the firm operates as a registered investment advisor (RIA).