



Sequoia Financial Group Partners With Kudu Investment Management To Buttress Continued Growth

NEW YORK and AKRON, OHIO, July 7, 2020 – Sequoia Financial Group, LLC (Sequoia), a registered investment advisor with \$4.7 billion in client assets, and Kudu Investment Management, LLC (Kudu), an independent provider of long-term capital solutions to asset and wealth managers worldwide, have announced that Kudu has made a strategic investment in Sequoia. Financial terms were not disclosed.

Sequoia provides financial planning, asset management, family wealth and retirement planning services. The firm is majority-owned by employees and continues to be led by Tom Haught, founder, president and CEO.

“In our pursuit of building an enduring firm, we are creating generational capital that will strengthen us now and offer durability and continuity for the future,” Haught said. “Kudu’s investment will help accelerate our U.S. expansion plans and support our mission, which is to be our clients’ most trusted advisor.”

“Tom and the Sequoia team have built a lasting and client-centric wealth management platform,” said Rob Jakacki, CEO of Kudu Investment Management. “We were attracted to the quality of leadership and focus on investor outcomes at Sequoia and are thrilled to be partnering with them.”

Established in 1991, Sequoia has 88 employees in six locations throughout Florida, Michigan, and Ohio. Sequoia was recognized by Schwab Advisor Services with the 2019 Best-in-Business IMPACT Award™ and named one of *Barron’s* Top 50 RIAs for 2019. Learn more here: <https://www.sequoia-financial.com/awards>.

Founded in 2015, Kudu now has 13 [partner firms](#) that collectively invest \$57 billion on behalf of individual and institutional investors worldwide in traditional and alternative strategies, as of March 31, 2020. Kudu, with more than \$500 million in capital commitments to date, is partnered with White Mountains Insurance Group, Ltd. (NYSE: WTM), a financial services holding company.

Colchester Partners, LLC served as financial advisor and Benesch, Friedlander, Coplan & Aronoff LLP served as legal advisor to Sequoia. Seward & Kissel LLP served as legal advisor to Kudu.

About Sequoia

Founded in 1991, Sequoia Financial Group, LLC takes a client-centered approach to providing comprehensive financial planning and wealth management services, including asset management, estate and retirement planning, fiduciary consulting and family wealth. Sequoia is committed to exceptional client service by building and maintaining strong relationships that emphasize long-term planning to help clients reach their financial and life goals. Learn more here: <https://www.sequoia-financial.com/>

About Kudu Investment Management

Kudu provides long-term capital solutions—including generational ownership transfers, management buyouts, acquisition and growth finance, as well as liquidity for legacy partners—to asset and wealth managers. Kudu was founded in 2015 and is backed by capital partner White Mountains Insurance Group, Ltd. (NYSE: WTM). For more information, please visit Kudu's [website](#).

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