

Dynasty Financial Partners Positions Itself for Next Chapter of Growth

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Hires Marc Hineman as Chief Operating Officer; Creates New Roles of Chief Growth Officer and Head of Core Services

ST. PETERSBURG, Fla.--(BUSINESS WIRE)-- Dynasty Financial Partners today announced strategic changes and additions to its executive team to facilitate innovation, streamline decision-making, and scale its business for future growth.

Marc Hineman joined the firm as Chief Operating Officer. His decades of experience in technology, operations, and corporate M&A, as well as his proven abilities as an operator driving scale and business growth will be invaluable to Dynasty as it explores new ways to innovate as the partner of choice for financial advisors and their clients. Hineman joins Dynasty most recently from PICO, whose technology and services power mission-critical systems for global banks, exchanges, electronic trading firms, quantitative hedge funds, and financial technology service providers. Prior to PICO, he held senior technology and operational positions at Wells Fargo and JPMorgan.

Dynasty Vice Chairman, Andrew Marsh, was named Head of Core Services. Marsh joined Dynasty in April 2023 as its first consulting Executive-in-Residence, before being named to the permanent role of Vice Chairman. As Head of Core Services, he will architect the services that comprise Dynasty's offering to its Network of firms together into one united, streamlined team, innovating the firm's approach to facilitating and supporting the growth of Network Firm businesses. Marsh will also continue his work advising Dynasty's Network of firms' CEOs in its Advisor to CEO program.

Tim Oden was named Chief Growth Officer. Oden previously served as Dynasty's most recent Executive-in-

Residence. In his almost 37 years at Schwab, he was part of the team that pioneered one of the largest custodian businesses in the industry. In this new role, he will leverage his deep industry experience and expertise to drive the growth of Dynasty and its Network.

“Our Network Partners are everything to us,” said Shirl Penney, Founder and CEO of Dynasty. “Their robust organic growth, resilient investment platforms and thriving M&A activity recently propelled us over the \$100 billion asset mark, so we are dedicated to constantly evaluating our ability to power their independence and continued growth. The strategic changes we have made to our business position us to support the extraordinary growth we – and they – are experiencing and forecasting. Marc, Tim, and Andrew are key to this effort, and we are very fortunate to welcome them to the Dynasty team.”

Fifty-six independent firms and over 400 advisors comprise the Dynasty Network. With average assets under management (AUM) per firm of nearly \$1.8 billion and average assets per advisor of approximately \$250mm, the Dynasty Network represents some of the highest AUM-per-firm and assets-per-advisor ratios in the industry.

About Dynasty

Dynasty is a provider of technology-enabled wealth management solutions and business services for financial advisory firms primarily focused on serving high net worth and ultra-high net worth clients. Dynasty provides access to a comprehensive platform of software and technology tools, business services and holistic investment management capabilities through an open-architecture platform delivered via a suite of proprietary and third-party technologies. Dynasty's technology, tools and services provide advisory firms the supported independence to launch their business, scale their operations and grow their firms — both organically and inorganically — while also allowing them to be more focused on and better equipped to serve their clients.

For more than a decade, Dynasty has championed the benefits of independent wealth management for high net worth and ultra-high net worth clients and has contributed to the movement of assets from traditional brokerage channels to the independent channels of wealth management. As Dynasty is becoming a recognized industry leader, Dynasty has differentiated itself by developing competitive strengths, including a deep understanding of and strong relationship with its clients, a comprehensive offering of services and technology-enabled solutions, the ability to leverage its size and breadth to invest, the flexibility and seamlessness enabled by a modular technology solution, the entrepreneurial culture and experienced and committed management team. Dynasty is committed to continually growing its business by facilitating existing advisory firm clients' growth, onboarding new clients, increasing the clients' use of its broader capabilities, launching additional solutions, and facilitating out complementary acquisitions.

For more information, please visit www.dynastyfinancialpartners.com .

Also visit Dynasty on social media:

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