

PRESS RELEASE

Pathstone
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Growing Smart(ly) In A Way That Matters **Pathstone to Acquire Dyson Capital Advisors**

Englewood, New Jersey, July 12, 2022—Pathstone, an independently operated, partner-owned advisory firm offering comprehensive, customized investment advice and family office services for families, family offices, and foundations and endowments, today announced it has entered into an agreement to acquire [Dyson Capital Advisors](#). Based in Alexandria, Virginia, Dyson serves select clients with investment advice, customized family office services, and high-touch administrative services.

Dyson Capital Advisors was founded in 2007 by Nicholas Perrins and Scott Darling who previously ran a single-family office. They were joined by Sarb Shah as a partner in 2013. Dyson serves approximately 80 clients overseeing \$3.5 billion of assets.

Pathstone and Dyson are well aligned in terms of philosophy and strategy. Over the past decade-plus, both firms have pursued a consistent strategy focused on advanced, comprehensive solutions for ultra-high-net-worth families. Both firms also understood early on that the future of the family office business model was in offering additional services such as accounting, bill pay, financial administration, and wealth planning.

“Almost ten years ago, Steve [Braverman, Pathstone Co-Chairman] and I met Nicholas and his leadership team to think about a combination,” said [Matthew Fleissig](#), CEO of Pathstone. “We were impressed then by Dyson’s business, leadership, and forward-thinking view of the industry – and how well it aligned with our strategic plan. We are thrilled at the opportunity to finally bring our two firms together and, importantly, to continue to strengthen our presence in our current office locations. We will now be one of the largest independent advisory firms in the DC metro area.”

“Each time Pathstone has combined with another firm, it has been about getting better and not just bigger,” added [Kelly Maregni](#), President of Pathstone. “As with our other transactions, there is a lot we can learn from Dyson. Their focus on private investments, client solutions, technology, and alternatives made this particularly interesting for Pathstone.”

Dyson clients will gain access to Pathstone’s innovative offerings and full matrix of services. “We are thrilled to be joining with long-time friends in the industry who share our collective vision,” said [Nicholas Perrins](#). “It is fitting that clients brought us together, and as one firm our ability to serve those clients will be taken to the next level. The combined firms’ scale will benefit both organizations’ clients by delivering greater access to value-added client solutions.”

The combination will bring Pathstone’s total assets under advisement to ~\$38 billion. Pathstone will now be in 14 locations with 295 team members, more than 115 of whom are shareholders of the firm.

Seward and Kissel served as legal counsel for Dyson Capital Advisors and Alston and Bird served as legal counsel to Pathstone.

About Pathstone

Pathstone is an independently operated, partner-owned advisory firm offering comprehensive family office services and customized investment advice for families, family offices, and foundations and endowments.

With decades of experience as trusted advisors, we employ an advocacy-focused model that empowers our clients to define and achieve their unique long-term goals and support their legacy. For more information, please visit www.pathstone.com.

About Dyson Capital Partners

Dyson is an investment advisory firm that provides customized family office services. We deliver a differentiated goals-based investment approach with high-touch administrative services to a select group of high-net-worth clients. For more information, please visit www.dysoncapital.com.

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