



MATRIX PRIVATE CAPITAL GROUP LAUNCHES NEW BRAND & REGIONAL EXPANSION – STRENGTHENING DIVERSIFIED ASSET MANAGEMENT FIRM
Richard S. Fuld, Jr. and Team Focus on Opportunities in Flawed, Fragmented Industry

New York, NY, November 6, 2017 – Matrix Private Capital Group, formerly Matrix Wealth Partners, today launched its official rebrand and expanded from its headquarters in New York City into two key wealth centers, Palm Beach, Florida and Los Angeles, California.

Led by former Lehman Brothers Chairman & CEO Richard S. Fuld, Jr., Matrix Private Capital Group is a diversified asset management firm providing tailored investment solutions to high net worth individuals, family offices and institutions.

“We see clear opportunities in a flawed and highly fragmented financial services market,” said Richard S. Fuld, Jr., Matrix Private Capital Group CEO. “While many of our competitors focus exclusively on specific areas such as wealth management, asset management, investment banking and private equity, we have integrated these services into one firm and our singular focus is to create value for our clients across their liquid wealth, privately-held assets and closely-held businesses.”

Growing Footprint

As part of its growth strategy, Matrix Private Capital Group is adding four senior investment professionals to the firm’s offices in New York, Palm Beach and Los Angeles.

Thomas Deutsch has joined the firm’s New York office as a Managing Director. Mr. Deutsch brings over a decade of investment experience as a securities analyst at Neuberger Berman and will be responsible for managing an alternative equity strategy to complement the firm’s wealth solutions.

Monte Resnick, Managing Director at Matrix Private Capital Group, has been appointed to run the Palm Beach office. Mr. Resnick, who has provided wealth advice to affluent families and foundations for the last 17 years, will be responsible for leading the Southeast expansion of the firm with the support of Client Service Director Michelle Lutein.

Matrix Private Capital Group has also hired Lance Bryan as a Managing Director to lead its Southern California wealth advisory capabilities. Mr. Bryan will work closely with affluent families, executives, entrepreneurs and creative artists and will be tasked with building the firm’s presence in the Los Angeles market.

“We are excited to announce the hiring of Tom, Monte, Michelle and Lance,” said Matthew Rubin, Matrix Private Capital Group Senior Partner and former Neuberger Berman Trust Company Chief Investment Officer. “Having known each individual for over a decade, we recognize their unparalleled focus and ambition to create value for their clients. From coast to coast, we are primed to deliver the



appeal of a small boutique with the industry reach, national footprint and expertise of a large institution.”

Compelling, Multifaceted Platform

Clients will benefit from a compelling offering in the marketplace. Unlike traditional wealth management firms, Matrix Private Capital Group takes a holistic approach to clients’ portfolios by helping them grow their privately-owned businesses as well as their liquid assets. The firm offers strategic advice and business development services to business owners, entrepreneurs and management teams through Mr. Fuld’s experience and extensive corporate and financial networks.

In addition, Matrix Private Capital Group provides its clients with direct access to select private equity opportunities and also complements traditional investment strategies with a concentrated long/short equity portfolio that adapts to changing market environments.

“We bring together vast and complementary industry experiences from across wealth advisory, investment banking and asset management and put that to work for our clients,” noted Justin Gaines, Matrix Private Capital Group Senior Partner and former Neuberger Berman investment strategist. “We employ a flexible and integrated team approach to help clients achieve their investment, business and philanthropic goals through personalized and transparent partnerships.”

Personal Touch

“Despite the proliferation of technology, robo-advisors, automation and algorithms in financial services, we still firmly believe in the value of relationships,” added Fuld. “We’ve assembled a team whose members share longstanding professional and personal ties that embody the tight-knit, team-oriented culture we are proud to bring to our clients.”

Learn more at www.matrixpcg.com

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