BRIX PARTNERS

Brix Wealth Management and KAP Planning to Merge

Broadened Expertise to Serve Business Clients and Affluent Marketplace

Brix Wealth Management and KAP Planning, have agreed to merge, it was announced today. The two organizations, which are part of the Connecticut-based Barnum Financial Group, will be known as Brix Partners when the merger is completed.

Brix Partners will have a deep and comprehensive set of services and a high level of expertise," said Garrett Hurley, the CEO and founder of Brix Wealth Management. "Brix serves business owners, entrepreneurs and C-level executives with complex financial, tax or insurance needs, and KAP is highly regarded for its work with thousands of ultra-high net worth clients to enhance, protect and preserve wealth," he noted.

We are very similar in size and culture, and our strengths complement one another," added Jared S. Levy, Managing Partner at KAP Planning.

The new firm will have offices at 277 Park Avenue in New York City.