

Klingenstein Fields Wealth Advisors Acquires the Assets of The Solaris Group, LLC

June 14, 2019

Klingenstein Fields Wealth Advisors (KFWA), a leading independent wealth advisor based in New York, today announced the acquisition, through its affiliate KF Group LP, of the assets of The Solaris Group, LLC (Solaris), a complementary New York-based wealth advisor. Together, the combined firm will have over \$4.0 billion in assets under management. Under the terms of the transaction, both firms will benefit from shared physical, investment, human, and technology resources. Kenneth D. Pollinger, CEO and Co-Chairman of KFWA, and James W. Fields, President of KFWA, will maintain their roles with the combined entity. Kenneth H. Fields, a founding partner of KFWA, will continue as Co-Chairman and Chief Investment Officer. Solaris co-founders Ralph Sinsheimer, Albert Bellas, and Stephen Brent Wells will continue in senior positions at the combined firm and will continue to manage Solaris client portfolios and relationships.

“With this transaction, KFWA solidifies its position as one of the top independent Registered Investment Advisers in the country, with a commitment to delivering high-quality wealth management and personalized service. We identified Solaris as an institution with a high caliber of experienced wealth management professionals who share the same client-centric approach to relationship management and stewardship of their clients’ assets. We are excited and look forward to the future, with clients from both KFWA and Solaris benefiting from the enhanced resources and capabilities offered,” said Kenneth D. Pollinger.

James W. Fields added, “The addition of Solaris allows KFWA to expand its range of investment management solutions, with Solaris’ deep expertise in the creation of multi-manager asset allocation portfolios that include traditional ‘long-only’ asset classes as well as alternative investments.”

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