

# CORIENT

## **Corient Acquires Multi-Family Office Business of Geller, Expanding U.S. Wealth Management Presence and Deepening Family Office Capabilities**

***Prominent New York-based MFO firm with \$10.4 billion in assets joining Corient***

*All data as at November 30, 2024.*

MIAMI (January 15), 2025) – **Corient**, one of the largest and fastest-growing national wealth advisors in the U.S., today announced it has acquired the multi-family office business of Geller & Company (“Geller MFO”). Geller MFO is a premier New York City-based multi-family office with \$10.4 billion in assets under management and advisement. This move reinforces Corient’s presence in one of the nation’s largest markets and deepens the firm’s family office capabilities.

Geller & Company LLC was founded in 1984 by Martin Geller, a pioneer in the multi-family office industry. Geller MFO provides a bespoke family office experience to ultra-high-net-worth (UHNW) individuals and families through a sophisticated, integrated family office platform that includes personal CFO and financial management, tax advisory and compliance, estate and generational wealth planning, financial reporting and accounting, and integrated investment management. In joining Corient, the Geller MFO team and its clients will gain access to a highly differentiated technology platform, operational, regulatory and compliance infrastructure, expanded investment capabilities, enhanced trust services, significant scale, and increased capital.

“The fact that a firm of Geller’s stature has chosen to join Corient speaks to the tremendous quality of our firm and the value of our differentiated private partnership structure and business model,” said Kurt MacAlpine, Partner and Chief Executive Officer of Corient. “I’m excited to welcome Marty Geller as a leader in our MFO business and his highly experienced team. We look forward to adding their significant tax and CFO expertise and other capabilities to our own, further enhancing our ability to provide clients with bespoke wealth management solutions that go beyond traditional wealth advisement.”

Mr. Geller said, “The Geller team has always put our clients at the center of everything we do – delivering objective advice and services as well as building lifelong relationships through the exceptional talent of our team and collaborative, high performance culture. We have been incredibly impressed with Corient and how its core strengths and culture align closely with our own. We firmly believe that Corient and Geller coming together will set the standard of what it means to be a family office in the UHNW space, which will result in continued advancement in how we develop our talent and service our multigenerational clients.”

Corient is a fiduciary, fee-only wealth management firm that is distinguished by its private partnership model, similar to leading professional services firms. This approach fosters collaboration and teamwork in pursuit of the shared vision to deliver unrivaled client excellence. Since its founding in 2020, Corient has grown rapidly and today has more than 240 partners and

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over 1,200 employees managing approximately \$182 billion in assets on behalf of high-net-worth and ultra-high-net-worth individuals, families and businesses across the United States.

## **About Corient**

Corient Private Wealth LLC is an integrated national U.S. wealth management firm providing comprehensive solutions to ultra-high-net-worth and high-net-worth clients. We combine the personal service, creativity and objective advice of a boutique with the power of an exclusive network of experienced advisors, capabilities and solutions to create a profoundly different wealth experience. As fiduciaries, we put our clients at the center of everything we do. We focus on exceeding expectations, simplifying lives and establishing lasting legacies. Headquartered in Miami, Corient is a subsidiary of Toronto-based CI Financial Corp. (TSX: CIX), a global asset and wealth management company with approximately US\$380.5 billion (C\$532.7 billion) in assets as at November 30, 2024. For more information, visit [corient.com](https://corient.com).

On November 25, 2024, CI Financial announced that it has entered into a definitive agreement with an affiliate of Mubadala Capital, the alternative asset management arm of Mubadala Investment Company, to take the firm private. Read the public announcement [here](#).

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