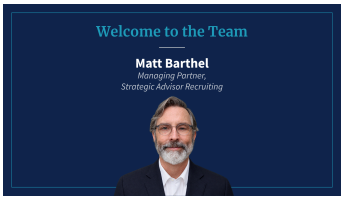
MAI Capital Management Expands Into Atlanta Market Through Acquisition of Waypoint Wealth Counsel

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and grow their wealth, today announced the acquisition of Waypoint Wealth Counsel LLC ("Waypoint"), an Atlanta-based, fee-only RIA offering comprehensive financial planning, investment management and financial advisory services. Waypoint manages approximately $490 million in assets under management (AUM) and serves more than 100 households. Terms of the transaction were not disclosed.

Founded in 2014 by Brad McGrew and Matthew Woods after years of experience at leading brokerage firms, banks and RIAs, Waypoint serves affluent and ultra-high-net-worth individuals and families, with a particular focus on entrepreneurs, business owners, executives and multigenerational families. The firm's differentiated approach to wealth management extends to how it invests on behalf of its clients, tailoring its investment strategy to the cash flow needs, risk tolerance and time horizon of each portfolio. As clients have increasingly sought opportunities outside public

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relationship-driven approach at the heart of its business. Its shared fiduciary, client-first philosophy with MAI made the firms a natural fit, while MAI's integrated planning resources, institutional family office platform, expanded alternative investment sourcing, lending capabilities and operational support will allow Waypoint to provide even more comprehensive advice.

"Brad, Matthew and their team have built an exceptional firm by combining institutional-caliber services with deeply personalized relationships," said **Rick Buoncore, Chairman & CEO, MAI Capital Management**. "That client-first culture aligns naturally with MAI. This acquisition gives us the opportunity to enter a market we have long viewed as strategically important, but finding the right people mattered more than simply expanding our footprint. With Waypoint, we found both an outstanding team and an opportunity-filled market."

"We are always looking for ways to do more for our clients, and after evaluating

this operational support will help our team unlock greater capacity to focus on serving clients."

Woods and McGrew will remain in place leading Waypoint, serving as Market Leaders in their new roles at MAI, helping to ensure continuity of service for the firm's clients.

"Atlanta is home to a growing concentration of entrepreneurs, executives and generational wealth, making sophisticated, full-service wealth management increasingly essential for the families and business owners we support," said Woods. "Joining MAI allows us to combine the local relationships and market knowledge we have built over more than a decade with the resources of a national firm. Through MAI's platform, including its Evoke ultra-high-net worth team, we're looking forward to the added depth and investment expertise, particularly as it relates to delivering on the needs of the clients we are fortunate to serve."

purpose to empower clients to simplify, protect, and grow the wealth they have worked so hard to build. Founded in 1973, the firm helps clients achieve their vision and goals through objective advice, tailored planning, comprehensive and integrated solutions, and highly personal service.

The firm has 42 offices across the United States, a team of over 700 people, and, as of June 30, 2026, nearly $80.4 billion in total assets including $73.8 billion in assets under management and $6.6 billion in assets under advisement*.

For more information, visit www.mai.capital or MAI's company page on LinkedIn.

*Including retirement plans and other accounts advised but not actively managed by MAI.

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We look forward to learning about your financial goals.

CONTACT

MAI Capital Management

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