



## VERUS PRESS RELEASE

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### **Cerity Partners Welcomes Verus Investments, Expanding Its Offering to Institutional and Wealth Clients**

*The addition of Verus will expand Cerity Partners' investment capabilities, enabling it to serve a broader range of institutions. As a result of the merger, Cerity Partners will advise on and provide services to both individual and institutional clients with assets totaling approximately \$1.3 trillion.*

**NEW YORK, February 11, 2026** — Cerity Partners, a leading independent investment and wealth management firm in the US, announced today that it is merging with Verus Investments, a leading institutional investment consulting and advisory firm that provides services to clients with approximately \$1.2 trillion in assets. The merger brings together two firms with aligned values and a shared commitment to client-first, objective advice, creating a unified team under the Cerity Partners brand.

Verus brings four decades of strategic investment expertise to a broad array of institutions, including public, nonprofit, multi-employer, and corporate clients.

"We are thrilled to welcome our new colleagues from Verus, which brings decades of experience and incredible expertise in helping institutions achieve their financial goals," said Kurt Miscinski, CEO of Cerity Partners. "This partnership meaningfully expands our leadership in the institutional space and strengthens our ability to serve clients of all sizes, complexities, and delegation preferences."

The combined firms will provide enhanced research, additional exceptional talent, technology and data efficiencies, and expanded capabilities, delivering a broader array of solutions to clients.



“Cerity Partners is a firm that shares our values: independence, trust, expertise, and diligence,” said Jeffrey MacLean, CEO of Verus. “By combining our institutional expertise with Cerity Partners’ scale and resources, our clients will continue to receive the personalized, fiduciary-driven guidance they rely upon, from the same professionals they have trusted for years, now supported by an even broader set of capabilities and expertise.”

As the wealth and institutional industries converge, the merger positions Cerity Partners at the forefront of the future of fiduciary advice, through fully integrated support for institutions and the leaders who guide them.

The merger is expected to close at the end of the first quarter of 2026, subject to customary regulatory approvals.

Houlihan Lokey advised Verus in the merger.

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### **About Cerity Partners**

Founded in 2009, Cerity Partners is a nationally recognized financial and wealth advisory firm serving high-net-worth individuals and their families, businesses and their leadership teams, and institutions.

### **About Verus**

For over 40 years, Verus has served a wide range of institutions including nonprofits, corporations, public, and multi-employer plans, helping them achieve their enterprise objectives and fiduciary obligations through rigorous research and objectivity.

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