



For Immediate Release

Silver Lane Advises on the Sale of \$3.4 Billion Impact Investing Firm, Threshold Group

New York, NY, October 12, 2017 — Silver Lane Advisors, a premier investment bank that specializes in the financial services industry, is pleased to have served as exclusive financial advisor to Threshold Group on its pending sale to Tiedemann Wealth Management. Threshold Group is a Seattle-based wealth advisory firm and family office founded by the Russell family with \$3.4 billion in assets under management; Tiedemann is a New York-based independent national wealth advisor with approximately \$12 billion in assets under advisement.

“Many of our clients have shown interest in impact investing,” said Michael Tiedemann, CEO and Chairman of the Board of the combined firm. “The addition of Threshold’s expertise in this area to our existing investment platform and comprehensive services will be a welcome addition for our clients today and prospects in the future.”

George and Jane Russell founded Threshold Group in 1998 when George sold his global investment services firm, known as Russell Investments. The Russell family were early innovators in impact investing, making their first impact investment in 2006. Today, Threshold Group is an independent wealth advisor and a leader in the rapidly growing impact investment sector, with \$1.5 billion invested in companies, organizations, and funds that generate measurable social and environmental benefit, as well as financial returns.

The Russell family will assume an ownership stake in Tiedemann and will continue as a client of the combined firm, which will operate under the Tiedemann Wealth Management brand. Tiedemann will advise on approximately \$15 billion in client assets from offices in New York, San Francisco, Seattle, Dallas, Palm Beach, Washington, D.C., and Wilmington, DE.

Silver Lane’s senior deal team included Liz Nesvold and Erika Cramer. Silver Lane previously advised Tiedemann on its 2016 acquisition of The Presidio Group, a San Francisco-based advisor with approximately \$4 billion in assets. For the full press release, please [click here](#).

About Silver Lane Advisors

Silver Lane is a premier investment bank that specializes in the financial services industry. From offices in New York, Chicago, and San Francisco, the firm advises financial institutions undergoing transformational events: M&A, capital raises, recapitalizations, re-equitizations, joint ventures, etc. Clients include investment and wealth management firms, insurance companies, commercial and private banks, fintech platforms, and securities firms, among others.

Silver Lane offers the sophistication of a bulge-bracket bank with the specialization of a boutique. The firm is consistently ranked #1 or #2 for the total number of M&A transactions in the asset and wealth management industries. Silver Lane’s senior bankers average more than 20 years of experience and collectively have completed approximately 300 investment banking engagements over the course of their careers. To learn more, please [click here](#).

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