NEWS

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Regal Wealth Management Partners with Merchant Investment Management and Opens its Doors in New York City

Privately-held, SEC Registered Investment Advisory Firm to Deliver Personalized, Fee-Only Financial Services. Merchant Has Taken a Minority Stake in the Firm.

NEW YORK CITY, May 13, 2020 – Bryan Staff, Managing Partner of Merchant Investment Management ("Merchant"), today announced the launch of Regal Wealth Management ("Regal"), an SEC Registered Investment Advisory firm based in New York City. Joining Regal is Managing Director Jason Bell, who began his career as an investment specialist at JP Morgan Private Bank and most recently was a financial advisor at UBS Financial Services. Regal has also added investment advisor Aron Wegner to Bell's team. Wegner previously was an associate at Nomura Securities International. Regal also enjoys a strategic relationship with Monarch Business & Wealth Management, a multi-family office that serves many artists, entertainers and professional athletes.

"We're proud to partner with Jason, Aron and the entire Regal Wealth Management team, and welcome the firm as a strategic partner of Merchant," said Staff. "We have several wealth advisory teams set to join Regal over the coming months and we are genuinely excited about the near term growth trajectory and strategic relationship with Barry Klarberg and our partners at Monarch."

Harry Tawil, a principal at both Monarch and Regal expressed his excitement about the growth of the firm. "The establishment of Regal as a wealth management firm is highly complementary to the family office and business management services currently offered through Monarch. Clients will now have access to the increased offering at their choosing," Tawil said.

Regal provides comprehensive wealth management services, using a goals-based approach to both planning and asset management. Serving primarily high-net-worth clients, the firm also focuses on risk management, tax minimization and legacy planning, as well as assisting with both business and personal financing needs through its relationships with credit facilities.

Regal has chosen to work with BNY Mellon | Pershing for clearing, settlement and custody services. Pershing Advisor Solutions LLC, member FINRA, SIPC, is a wholly owned subsidiary of The Bank of New York Mellon Corporation (BNY Mellon). Clearing, custody or other brokerage services may be provided by Pershing LLC, member FINRA, NYSE, SIPC. Pershing Advisor Solutions relies on its affiliate Pershing LLC to provide execution services. Bank custody and private banking solutions are provided by BNY Mellon, N.A., member FDIC, a wholly owned subsidiary of The Bank of New York Mellon Corporation. Except with respect to uninvested cash held in a bank deposit account chosen by client as part of a sweep election, assets custodied at BNY Mellon, N.A. are segregated from the general assets of BNY Mellon, N.A.

ABOUT REGAL WEALTH MANAGEMENT, LLC

Regal Wealth Management, LLC, is a privately-owned SEC Registered Investment Advisor (RIA) based in New York City. Founded in 2019, the firm provides comprehensive financial planning and investment management services to individuals and families with complex financial needs. For additional information, please visit: www.regalwm.com.

ABOUT MERCHANT INVESTMENT MANAGEMENT, LLC

Merchant is a private partnership providing growth capital, management resources, strategic opportunities and direction to independent financial services companies, particularly those focused on wealth and asset management. For additional information, please visit: www.merchantim.com

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