



FOR IMMEDIATE RELEASE

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XML Financial Group completes merger with Collins Investment Group

Rockville-based advisory firm expands wealth management team, footprint in D.C. metro area

ROCKVILLE, MD (2 September 2021) – [XML Financial Group](#) (XML), an independent wealth and investment management firm with offices in Maryland, Virginia and Colorado, is pleased to announce today it has completed its merger with [Collins Investment Group](#) (CIG), a wealth management practice in Bethesda, Maryland.

Founded in 2008 by Robert Collins, CIG provides comprehensive wealth and investment management services to clients nationwide. Over the last 20 years, founder Robert Collins has received numerous industry accolades, including being named to the recent [Forbes America's Top Wealth Advisors list for 2021](#).

Effective September 1, CIG operates as a division of XML Financial Group. The CIG team will leverage XML's operational resources to support continued team growth, while gaining access to XML's expanded services and investment capabilities to enhance its client experiences.

For XML, the merger adds eight employees, bringing the firm's current total to 40. The addition of CIG deepens its Washington, D.C.-market presence and helps position it for additional growth in the Mid-Atlantic.

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WWW.XMLFG.COM

Investment advisory offered through XML Financial Group. Securities offered through XML Securities, LLC, member FINRA/SIPC



CIG's management team has also joined the XML leadership team, bringing resources and expertise. The CIG team adds more than \$1 billion in client assets to XML and its affiliated broker-dealer, XML Securities, LLC, member FINRA/SIPC, totaling approximately \$3 billion in client assets.

"We are thrilled to welcome Bob and his team to the XML family," said [Brett Bernstein](#), CEO and Co-Founder of XML. "Our practices strive to provide outstanding wealth management solutions for clients nationwide. We look forward to building on each other's strengths to help clients achieve their long-term financial goals."

"This partnership provides CIG with additional financial planning and investment resources to serve our clients, while also creating a future succession plan for the team and our clients," said Collins. "We are excited to begin our next chapter as a division of XML."

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About XML Financial Group

XML Financial Group ("XML") is an independent wealth and investment management firm headquartered in Rockville, Maryland. XML offers a suite of wealth and investment management services to high-net-worth individuals, businesses and families located across the country. For more information about XML, please visit www.xmlfg.com.

About the Forbes America's Top Wealth Advisors List

The Forbes ranking of America's Top Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

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