

AVALON ADVISORS ANNOUNCES SAN ANTONIO EXPANSION
Deal Enhances, Expands Capabilities
Serving Needs of San Antonio and South Texas Clients

Avalon Advisors, LLC (“Avalon”) and Matterhorn Capital Management, LLC (“Matterhorn”) today announced their companies have entered into an agreement which will build upon and enhance their capabilities to meet the needs of clients in San Antonio and throughout the South Texas region. Going forward, the joint entity, with combined assets under management exceeding \$6 billion, will operate as Avalon Advisors, LLC.

Since its inception in 2001, Avalon has served San Antonio clients from its Houston headquarters, and in 2014 the firm opened a local office to expand its central and south Texas presence significantly under the leadership of San Antonio native Rob McClane.

A San Antonio-based and independently owned investment management firm, Matterhorn, was founded in 2005 to manage equity and fixed income portfolios for high net worth individuals, family offices, regional advisory groups and institutional investors throughout South Texas.

“We have long admired Matterhorn’s stewardship approach and investment performance for the families they serve. They bring an invaluable group of people, a strong culture, consistent performance and a pursuit of excellence that aligns naturally with Avalon and the families we will now serve together,” said Henry J. Lartigue, Avalon’s CEO and CIO. “Such a significant partnership builds on our long standing relationships with leading San Antonio and South Texas families and enhances both our portfolio management and wealth advisory capabilities. Both firms have earned a sterling reputation for transparency, innovation, wealth preservation and fiduciary responsibility; and we will remain steadfastly committed to carrying these values forward.”

“We look forward to joining the Avalon team and having our clients benefit from the expansion of overall resources and capabilities,” said Juan Landa, Matterhorn’s CEO. “The fact that we are committed to maintaining the continuity of our advisory teams means the investment management philosophy our clients have come to know and trust will not only be preserved but enriched.”

Avalon Advisors’ San Antonio office in McCombs Plaza, convenient to many of the firm’s existing clients, is expanding to accommodate the additions to the Avalon team.

ABOUT AVALON ADVISORS, LLC

Avalon is a Houston-based independent registered investment adviser offering investment management and financial advice for individuals, families and institutions. Founded in 2001, Avalon offers a full suite of internally managed strategies, including domestic and international equities and fixed income, as well as access to select alternative strategies.

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