

Uinta Investment Partners Acquires Interest in Chalice Wealth Partners

October 2017

Uinta Investment Partners (Uinta) is pleased to announce our investment in Chalice Wealth Partners. Uinta is a multi-family office founded in 2017 by investment veterans Gavin James and Don Plotsky.

“Chalice is a FinTech Member Benefit Organization for Wealth Advisors who are Independent Business Owners. We provide a fully integrated, shared services, single sign on technology platform to gain access to all the tools and resources an Advisor needs to run a wealth management business better,” said Keith Gregg, CEO of Chalice Wealth Partners.

“This is what Uinta is all about. Identifying unique investment opportunities, committing capital and supporting management with our expertise and experience. We strongly believe that independent advisors will derive a huge benefit when they join the Chalice platform. It will allow them to efficiently transition and it will provide them with the tools they need to manage and grow their business on a single, easy to access platform,” according to James and Plotsky.

Chalice has already announced mergers with Niagara International Capital Limited, a broker dealer, and Dynamic Wealth Management, an independent advisor platform. The principals of Chalice, Keith Gregg (CEO), Anthony Nanula (President) and Jim Cannon (COO) have extensive experience in building and supporting independent advisory firms and broker dealers. Gavin James and Don Plotsky - co-founders of Uinta - bring over 60 years of investment management experience and, while not part of the management team, will provide insights and advice as external advisors and investors in the firm. Mr. James has been appointed to Chalice’s board of directors.

For additional information please contact Gavin James or Don Plotsky at info@uintapartners.com or visit our website at www.uintainvestmentpartners.com.