



## **FOR IMMEDIATE RELEASE**

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## **The Buckingham Family of Financial Services Unveils New Brand Structure**

A unified brand identity following the 2018 merger of BAM Advisor Services and Loring Ward will better position Buckingham in an evolving financial services landscape

St. Louis — November 20, 2019

The Buckingham Family of Financial Services announced today that it will unify all its businesses under the Buckingham brand. This initiative represents a milestone following the November 2018 merger of BAM Advisor Services and Loring Ward, and will enable the firm to better align the brands within its wealth management and turnkey asset management platform (TAMP) business lines.

The new brand architecture is designed to bring greater clarity, cohesion and consistency to the way current and future clients access, engage and experience the firm's services. These changes, expected to become effective in the first quarter of 2020, mark a significant step in the firm's strategic effort to create a simpler, more focused framework for delivering comprehensive solutions to both its wealth management and TAMP clients.

### **Buckingham Wealth Partners**

Buckingham Wealth Partners will become the new identity of the businesses collectively known now as The Buckingham Family of Financial Services. The new overarching brand identity will better position the firm for continued growth, allowing it to capitalize on opportunities across the wealth management space. Following the change, the firm's wealth management business line, Buckingham Strategic Wealth, and its TAMP business line, Buckingham Strategic Partners, will both operate under the Buckingham Wealth Partners brand umbrella.

### **Buckingham Strategic Wealth**

The firm's wealth management business line, a St. Louis, Missouri-based registered investment adviser (RIA) with 35 offices in 21 states, will retain the name Buckingham Strategic Wealth. It will, however, adopt a refined visual identity and new logo as it continues serving individuals, businesses, nonprofits, retirement plans, and dental and professional practice owners.

### **Buckingham Strategic Partners**

The firm's TAMP business line – currently comprising the BAM Advisor Services, BAM ALLIANCE, and Loring Ward brands – will be known as Buckingham Strategic Partners. Buckingham Strategic Partners will combine the distinct strengths of these businesses into a new iteration of the firm's comprehensive platform solutions, affording an easier way for its advisor clients to take advantage of the benefits derived from last year's merger. It will also simplify its advisor clients' access to technology while providing a deeper bench of specialists and greater opportunities for thought leadership.

Buckingham Strategic Wealth and Buckingham Strategic Partners will share an integrated leadership team as part of Buckingham Wealth Partners, which will execute on the mission of the combined businesses. Buckingham

Wealth Partners, a partner firm of Focus Financial Partners since 2007, will continue to be led by Board Chairman and longtime Chief Executive Officer Adam Birenbaum and Chief Operating Officer David Levin. Buckingham Strategic Wealth, the firm's wealth management business line, will continue to be led by Chairman Justin Ferri and President Wendy Hartman. Buckingham Strategic Partners, the firm's TAMP business line, will continue to be led by Chairman Alex Potts and President Mike Clinton.

"I am thrilled that how we present ourselves to our clients and advisors will now fully align with our capacity to deliver on the promise of a world-class wealth management partnership," said Adam Birenbaum. "We are known for our evidence-based investment philosophy and comprehensive planning acumen, and for furnishing the comprehensive support other advisory firms require to evolve their businesses. It is precisely this intellectual capital, which has been created over decades, that positions us to continue enhancing our offerings and building upon our core strengths."

"The whole of our combined organization is far stronger than the sum of its individual parts," said Alex Potts. "Our new, integrated branding makes it far easier to communicate this strength, simplifying the way our advisor community can talk about the partner they use to power their businesses and help investors achieve their goals."

The new Buckingham Wealth Partners, Buckingham Strategic Wealth and Buckingham Strategic Partners brand architecture was designed to acknowledge the unique history of each business line, while also reflecting the importance of a unified brand identity in positioning a leading wealth management platform for future success. Additional details of the firm's rebranding effort will be shared over the coming months.

*Photos, images, bios and interviews available upon request.*

#### **About The Buckingham Family of Financial Services (Buckingham Wealth Partners)**

The Buckingham Family of Financial Services is a growing organization of advisors, financial specialists and national thought leaders committed to driving comprehensive wealth management solutions and acting in the best interest of its clients. For more information, visit [buckinghamwealthpartners.com](https://buckinghamwealthpartners.com).

#### **About Buckingham Strategic Wealth**

Buckingham Strategic Wealth is a registered investment adviser (RIA) that helps individuals, businesses, nonprofits, retirement plans, and dental and professional practice owners achieve their most important goals by building comprehensive, evidence-based financial plans. Tracing its origins back to 1994, Buckingham Strategic Wealth is headquartered in St. Louis, Missouri, and maintains 35 offices in 21 states. For more information, visit [buckinghamstrategicwealth.com](https://buckinghamstrategicwealth.com).

#### **About BAM Advisor Services and Loring Ward (Buckingham Strategic Partners)**

BAM Advisor Services, home to The BAM ALLIANCE, is a turnkey asset management platform (TAMP) with origins going back to 1997 that provides solutions to help like-minded RIAs become better connected and more successful organizations. The Loring Ward business, a TAMP founded in 1990 and headquartered in California's Silicon Valley, became part of BAM Advisor Services in November 2018 and helps create a better wealth experience for financial advisors and their clients. Together, they serve a nationwide community of financial advisors. For more information, visit [buckinghamstrategicpartners.com](https://buckinghamstrategicpartners.com).