

**FOR IMMEDIATE RELEASE:**

March 1, 2018

**FOR MORE INFORMATION:**

Leslie Garrison  
314.783.2925

lgarrison@bamadvisor.com

## WealthQuest Financial Services Joins Buckingham Strategic Wealth

The addition of WealthQuest Financial Services expands Buckingham's presence in Virginia. Buckingham manages or administers \$12.9 billion in assets (as of Feb. 15, 2018).

St. Louis — March 1, 2018

Buckingham Strategic Wealth, the St. Louis-based wealth management firm with a nationwide footprint, has expanded its presence in Virginia and increased its depth of talent by acquiring Norfolk-based WealthQuest Financial Services, which will assume the Buckingham name.

WealthQuest Financial Services was established in 2000 by CPA firm Wall, Einhorn & Chernitzer PC, and, like Buckingham, provides evidence-based investment management and comprehensive financial planning services to families, nonprofits and businesses. The team at WealthQuest Financial Services, led by Jeffrey Chernitzer, CPA/PFS, and Cheryl Furlong, CPA, CFP®, has been associated with Buckingham for nearly two decades due to their firm's membership in The BAM ALLIANCE, a nationwide community of independent advisory firms that engage BAM Advisor Services, Buckingham's sister company. Chernitzer will serve as advisory team leader of Buckingham's new Norfolk office. Wall, Einhorn & Chernitzer was not included in the transaction.

"The evolution of our partnership with Buckingham will allow us to deepen our client experience and, because we're joining a firm that shares our core values and comprehensive approach to wealth management, leverage additional resources to better serve our clients and help them reach financial peace of mind," Chernitzer said.

The transaction, which closed March 1, 2018, also brings Amy Berry, Ted Ring, Sarah Shaffer and Mine' Weaver to the Buckingham team, along with more than \$610 million in assets under management (as of Feb. 15, 2018).

Buckingham CEO Adam Birenbaum echoes Chernitzer's sentiment. "I truly believe this transaction will result in a stronger organization and a better Buckingham," he said. "It's clear that Jeff, Cheryl and the entire WealthQuest team share our dedication to putting clients first in everything we do. Our common vision means that, as one firm, we can amplify our ability to help clients connect their values and their money in a fundamental way. For us, this is an amazing evolution of a long relationship. We have been friends with Jeff, Cheryl and their team for many, many years now. We've gotten to know them as people, and as advisors, and it's just a thrill to have them choose to be a part of what we are building at Buckingham."

WealthQuest Financial Services represents another chapter in Buckingham's robust transaction story; since 2010, the firm has grown to include offices in 22 cities across the nation.

"Bringing WealthQuest into the Buckingham family is an important step in our strategic effort to deliver deeper and more meaningful wealth management solutions to improve our clients' lives," Birenbaum said. "It adds to our experienced and genuinely exceptional talent base while positioning the firm to offer even greater levels of service to current and future clients in Virginia and around the country."

Buckingham is a partner firm within Focus Financial Partners and home to BAM Advisor Services and The BAM ALLIANCE, a community of more than 130 independent, like-minded advisory firms throughout the country that collectively manage or administer \$33.5 billion (as of Feb. 15, 2018).



*Photos, bios and interviews available upon request.*

**About Buckingham Strategic Wealth**

Founded in 1994, Buckingham Strategic Wealth helps individuals, businesses, trusts, nonprofits, retirement plans and medical practice owners achieve their most important goals by creating customized, comprehensive, evidence-based financial plans. Its investment philosophy is rooted in an academic approach tailored to address each client's distinct willingness, ability and need to accept market risk. As a registered investment advisory firm, Buckingham operates under a fiduciary obligation to its clients. The firm's investment approach centers on modern portfolio theory implemented through passively managed mutual funds and the firm's fixed income portfolio design and execution capabilities. Buckingham is headquartered in St. Louis and has offices in Arizona, California, Colorado, Florida, Illinois, Indiana, Iowa, Maryland, Nebraska, New Jersey, Pennsylvania, Texas, Virginia and Wyoming. Additional information can be found at [www.buckinghamadvisor.com](http://www.buckinghamadvisor.com).