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**FOR MORE INFORMATION:**

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## Arnett Carbis Toothman Wealth Advisors Joins the Buckingham Strategic Wealth Team

The addition of Arnett Carbis Toothman Wealth Advisors extends Buckingham's nationwide footprint into West Virginia and expands the firm's presence in Pennsylvania.

St. Louis — July 1, 2018

Buckingham Strategic Wealth, the St. Louis-based wealth management firm, has expanded its presence into West Virginia and increased its depth of talent in Pennsylvania by acquiring Arnett Carbis Toothman Wealth Advisors, which will assume the Buckingham name.

Founded in 2002, Arnett Carbis Toothman Wealth Advisors has locations in Charleston, West Virginia, and New Castle, Pennsylvania, and, like Buckingham, provides evidence-based investment management and comprehensive financial planning services to families, nonprofits and businesses. Arnett Carbis Toothman Wealth Advisors has been associated with Buckingham for more than 15 years due to its membership in The BAM ALLIANCE, a nationwide community of independent advisory firms that engage BAM Advisor Services, Buckingham's sister company. Arnett Carbis Toothman Wealth Advisors, led by Cindy McGhee, CPA/PFS, CTFA, CRSP, previously was affiliated by common ownership with accounting firm Arnett Carbis Toothman LLP, which was not included in the transaction and will remain the same.

"As we searched for ways to deepen the experience and service our clients receive, as well as best solutions to various technology challenges, regulatory requirements and long-term business continuity, it became clear that evolving our ongoing partnership with Buckingham was the natural answer," McGhee said. "Buckingham's investment philosophy is rooted in the same disciplined, academically based strategy we've long employed, and together we share a fiduciary commitment to helping clients make sound investment decisions."

The transaction, which closed July 1, 2018, also brings Christopher Erlewine, CFP®, CRPC®; Nicholas Oxley, AIF®; Corey Altman, CPA, CGMA, CFP®; Jerry Slone; Shannon Pauley; and Dianna Lusk to the Buckingham team, along with approximately \$470 million in assets under management (as of June 15, 2018).

Buckingham CEO Adam Birenbaum echoes McGhee's sentiment. "We have had ample opportunity over the years to get to know Cindy, Chris, Nick, Corey and the entire team, both as friends and as advisors," he said. "We could not be more excited to welcome such a dedicated group of professionals to our firm, and we are deeply honored they chose to be a part of what we're building at Buckingham. Our common commitment to putting clients first in everything we do will only make us a stronger, better organization as a result."

Arnett Carbis Toothman Wealth Advisors represents another important chapter in Buckingham's robust and ongoing transaction story; since 2010, the firm has grown to include offices in 26 cities across the country. Following Buckingham's July 1, 2018, transactions, the firm is approaching \$15 billion in assets under management or administration.

"This transaction is a significant step in our strategic effort to deliver more meaningful wealth management solutions to improve our clients' lives," Birenbaum said. "It adds to our experienced, exceptional talent base



while positioning the firm to offer even greater levels of service to current and future clients in West Virginia and Pennsylvania.”

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 \$34.1 billion (as of June 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, West Virginia and Wyoming. As of June 15, 2018, Buckingham managed or administered \$14.1 billion in assets. Additional information can be found at [www.buckinghamadvisor.com](http://www.buckinghamadvisor.com).