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Jay Wirig and J.P. Wirig Join Buckingham Strategic Wealth

The addition of Jay Wirig and J.P. Wirig expands Buckingham's presence in California.

St. Louis — July 1, 2018

Buckingham Strategic Wealth, the St. Louis-based wealth management firm with a nationwide footprint, has expanded its presence and depth of talent in California through the addition of Jay Wirig, CPA, and J.P. Wirig, CPA.

Joining the Wirigs at Buckingham, as of July 1, 2018, is Kevin Yee. The advisory team will form Buckingham's new Walnut Creek, California, office. The Wirigs also will lead a separate accounting practice, JNJP Certified Public Accountants Inc. Joining them at JNJP is Lisa Nakagawa, Anney Yoon, Valerie Stone, Janet Mata, Karina Floresca and Holly Barney.

Together, Jay Wirig and J.P. Wirig boast more than 55 years of experience in the accounting and financial services fields. Like Buckingham, they provide evidence-based investment management and comprehensive financial planning services to individuals and families. The Wirigs have been associated with Buckingham for more than 18 years through their long connection with The BAM ALLIANCE, a nationwide community of independent advisory firms that engage BAM Advisor Services, Buckingham's sister company.

"We continually consider the experience our clients receive, industry best practices and the future as we strive to provide them the best possible investment options and wealth management solutions," Jay Wirig said. "Over the years, we have seen Buckingham grow into a firm with nationwide reach, scale and resources that we want to put to work for the clients we serve."

Buckingham CEO Adam Birenbaum echoes Wirig's sentiment. "We share a common belief in doing the right thing and acting in our clients' best interests at all times, and we have the same core values and academically based investment philosophy," he said. "Aligning our efforts will allow us to better serve our current and future clients, helping them reach their most important financial and life goals through holistic planning that focuses on highly engaged and profoundly personal relationships."

The addition of Jay Wirig and J.P. Wirig brings to Buckingham more than \$290 million in assets under management (as of June 15, 2018). Following Buckingham's July 1, 2018, transactions, the firm is now approaching \$15 billion in assets under management or administration.

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.