

FOR IMMEDIATE RELEASE:

December 21, 2018

FOR MORE INFORMATION:

Meredith Boggess

314.743.2295

mboggess@bamadvisor.com

Dan Goldie Financial Services Agrees to Join Buckingham Strategic Wealth

The anticipated addition of Dan Goldie Financial Services will expand Buckingham's nationwide footprint while extending the firm's Silicon Valley presence.

St. Louis — December 21, 2018

Buckingham Strategic Wealth, the St. Louis-based wealth management firm, has agreed to acquire Palo Alto-based Dan Goldie Financial Services LLC, which will assume the Buckingham name. The transaction, which is expected to close Feb. 1, 2019, subject to customary closing conditions, will expand Buckingham's presence and extend its depth of talent in Silicon Valley and in California more widely.

Dan Goldie Financial Services LLC was founded in 2009 by former top-ranked tennis pro Dan Goldie, co-author of 2011's "The Investment Answer," a New York Times bestseller. Like Buckingham, Goldie and his team provide evidence-based investment management and comprehensive financial planning services to individuals, families and businesses.

"My priority has always been to do what's best for my clients and to serve them at the highest possible level," said Goldie, who will join Buckingham as a wealth advisor upon closing of the transaction. "The decision to become a part of Buckingham, a firm that shares our core values, investment philosophy, and commitment to meeting client needs in a timely, attentive and personal way, will enhance our ability to offer an outstanding wealth management experience."

The transaction will also bring Dirk Gilliard to the Buckingham team as a wealth advisor. Buckingham has had an office in Palo Alto since 2012, in addition to other California offices in Irvine, Walnut Creek and Santa Rosa.

"Dan and Dirk will be outstanding additions to Buckingham as a whole and to our California team specifically," said Buckingham CEO Adam Birenbaum. "Aligning our efforts and combining our talents will allow us to more efficiently and effectively help clients reach their most important financial and life goals through holistic, highly engaged financial planning. We're so excited Dan and Dirk chose Buckingham to pursue this opportunity."

"What's more, adding to the Buckingham family is a crucial aspect of our continuing strategic effort to deliver more evolved wealth management solutions to current and future clients in Silicon Valley, across California and throughout the country," Birenbaum added.

Buckingham is a partner firm within Focus Financial Partners and sister company to BAM Advisor Services, home to The BAM ALLIANCE and Loring Ward, which together serve a nationwide community of more than 300 independent Registered Investment Advisors (RIAs) along with thousands of other financial advisors throughout the country.

Dan Goldie Financial Services LLC, which currently engages Loring Ward, represents another important chapter in Buckingham's robust, ongoing transaction story. Since 2010, Buckingham has grown to include more than two dozen offices in cities across the country while becoming a recognized destination for succession solutions.



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, Missouri, and has offices in Arizona, California, Colorado, Florida, Illinois, Indiana, Iowa, Maryland, Nebraska, New Jersey, Pennsylvania, Texas, Virginia, West Virginia and Wyoming. For more information, visit buckinghamadvisor.com.