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**FOR MORE INFORMATION:**

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## Alpern Wealth Management Joins Buckingham Strategic Wealth

The addition of Alpern Wealth Management extends Buckingham's nationwide footprint while expanding the firm's Pennsylvania presence into the Pittsburgh area.

St. Louis — January 2, 2019

Buckingham Strategic Wealth, the St. Louis-based comprehensive wealth management firm with a national reach, has expanded its presence in Pennsylvania through the acquisition of Pittsburgh-based Alpern Wealth Management, which will assume the Buckingham name.

Alpern Wealth Management is led by Adam Yofan, CPA/PFS, and, like Buckingham, provides evidence-based investment management and comprehensive financial planning services to individuals, families and businesses.

"Building strong, enduring relationships and doing what's best for our clients has long been a foundation of our firm," Yofan said. "Joining Buckingham, a firm that shares our core values and full-service approach to wealth management, will allow us to enhance the services we provide as we begin to take advantage of its distinct strengths — including enhanced technology and access to extensive resources and specialists."

The transaction, which closed Jan. 1, 2019, also brings Mary Lyn Saly and Monica Kovacs to the Buckingham team. Buckingham's new Pittsburgh office is the firm's third in Pennsylvania, joining locations in Wyomissing and New Castle.

"Adam, Mary Lyn and Monica are an outstanding addition to Buckingham as a whole and to the team we have in place to serve our Pennsylvania clients specifically," said Buckingham CEO Adam Birenbaum. "Aligning our efforts will allow us to better help clients in Pittsburgh and across country reach their most important financial and life goals through holistic financial planning that connects their money with their values. We're honored they've chosen to be an integral part of what we're creating here at Buckingham."

Welcoming Alpern Wealth Management represents another significant chapter in Buckingham's robust and ongoing transaction story. Since 2010, the year in which the firm closed its first acquisition, Buckingham has grown to include offices in 30 cities across the country, becoming a recognized destination for succession solutions.

"Continuing to build the Buckingham family is a crucial aspect of our ongoing strategic effort to deliver more evolved and best-in-class wealth management solutions to our current and future clients," Birenbaum said. "Deepening our exceptional bench of talent and offering even more personal levels of service all further our pursuit of an unrivaled client experience."

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.

*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, Oregon, Texas, Virginia, West Virginia and Wyoming. For more information, visit [buckinghamadvisor.com](http://buckinghamadvisor.com).