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Griffon Financial Planning Joins Buckingham Strategic Wealth

The addition of Griffon Financial Planning Inc. enhances Buckingham's depth of talent and extends the firm's nationwide presence into Oregon.

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Buckingham Strategic Wealth, the St. Louis-based wealth management firm, has acquired Griffon Financial Planning Inc., expanding its presence into Oregon. Griffon Financial Planning Inc. will assume the Buckingham name.

Founded in 2000, Griffon Financial Planning Inc. is led by Ann Laferriere, CFP®, and maintains locations in Bend and Ashland, Oregon. Like Buckingham, Griffon Financial Planning Inc. provides evidence-based investment management, comprehensive financial planning and retirement services to individuals and families.

"It's thrilling to have found this opportunity to retain our personal and customized approach while accessing Buckingham's intellectual horsepower and bench strength," Laferriere said. "We'll be able to enhance the level of service we provide to our clients as we take advantage of Buckingham's technology, planning resources and specialists, and evidence-based investment strategies. This relationship also will give us more time to do what we enjoy most – spending time with our clients and working with them to help realize their highest financial aspirations."

The transaction, which closed Jan. 1, 2019, also brings Mary Ericksen, CFP®, CPA, to the Buckingham team.

Buckingham CEO Adam Birenbaum echoes Laferriere's sentiment. "Both our firms are rooted in striving for an unparalleled client experience, one that's marked by evolving financial planning solutions and deeply personal relationships, which at the end of the day should be a fundamental focus of any true wealth management firm," he said. "We also share a common interest in putting our clients first in everything we do, so the decision to combine our efforts made a lot of sense – for us, for Ann, and for the families we serve."

The acquisition of Griffon Financial Planning Inc. represents another important milestone on Buckingham's path to becoming a destination for succession solutions. Since 2010, the year the firm completed its first transaction, Buckingham has grown to include offices in 30 cities across the country.

"This transaction is a significant step in our ongoing and strategic effort to be the recognized leader in the independent wealth management space," Birenbaum said. "It adds to our experienced, exceptional talent base while putting us in a great position to even better serve current and future clients in Oregon. We're honored that Ann chose Buckingham for this wonderful opportunity."

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.