

**FOR IMMEDIATE RELEASE:**

May 16, 2019

**FOR MORE INFORMATION:**

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## Lake Mary Wealth Management Joins Buckingham Strategic Wealth

The addition will expand Buckingham's nationwide presence

St. Louis — May 16, 2019

Buckingham Strategic Wealth, the St. Louis-based wealth management firm, has agreed to acquire Lake Mary Wealth Management LLC of Maitland, Florida. The transaction is expected to close in the second quarter of 2019, subject to customary closing conditions.

Lake Mary Wealth Management ("Lake Mary"), a fee-only registered investment advisor founded by Paula Taylor, CPA/PFS, CFP®, entered into the definitive agreement for this transaction pursuant to the terms of a succession agreement it has had in place with Buckingham Strategic Wealth ("Buckingham") since 2017. However, Lake Mary has been associated with Buckingham for more than 20 years through its membership in The BAM ALLIANCE, a community of independent advisors located across the country that engage BAM Advisor Services, Buckingham's sister company.

Like Buckingham, Lake Mary provides comprehensive financial planning and investment management services to individuals and families. Both firms emphasize an evidence-based and holistic approach to wealth management, which will help facilitate a seamless transition for Lake Mary's clients.

"I have long been passionate about helping clients achieve their most important financial goals, and doing so through a service-first approach," said Taylor. "In searching for a succession partner, it was critical for me to be convinced that my clients would receive the same high level of service they have come to expect from me. Over the years, I have seen up close the level of service Buckingham provides to its clients. I could not think of a better solution to provide continuity to the clients for which I have such deep respect and admiration."

Buckingham CEO Adam Birenbaum echoed that sentiment. "We are privileged to serve as Lake Mary Wealth Management's succession partner and we welcome Paula's clients into the Buckingham family," he said. "It's no accident our firms share a similar investment philosophy and the same deep dedication to outstanding client service. Add to this our long association – through The BAM ALLIANCE, Paula and Lake Mary have been a fixture in our world for two decades – and the strength of our relationship becomes clear. Given the robust services and deep bench of talent we have spent years developing, this partnership is indicative of the value that Buckingham brings to both advisors and clients through diligent and thoughtful succession planning."

Since 2010, Buckingham has grown to comprise 33 offices in 19 states, including Florida offices in Miami and Boca Raton, as part of a strategic effort to deliver deeper and more meaningful wealth management solutions to current and future clients and become a recognized destination for succession solutions.

Buckingham is a partner firm of 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 along with thousands of other financial advisors throughout the United States.



*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. Buckingham's investment approach centers on modern portfolio theory implemented through passively managed mutual funds and its fixed income portfolio design and execution capabilities. Buckingham is headquartered in St. Louis and maintains 33 offices in 19 states. For more information, visit [buckinghamadvisor.com](http://buckinghamadvisor.com).