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HORNE Wealth Advisors Agrees to Join Buckingham Strategic Wealth

The anticipated addition of HORNE Wealth Advisors will expand Buckingham's nationwide presence into Mississippi and Tennessee.

St. Louis — June 3, 2019

Buckingham Strategic Wealth ("Buckingham"), the St. Louis-based wealth management firm, has agreed to acquire HORNE Wealth Advisors LLC ("HORNE Wealth"), a registered investment adviser with offices in Ridgeland, Mississippi, and Nashville, Tennessee. The transaction, which is expected to close in the third quarter of 2019 and subject to customary closing conditions, will expand Buckingham's nationwide presence while also extending its depth of talent.

Like Buckingham, HORNE Wealth provides evidence-based investment management and comprehensive wealth planning services to individuals, families, institutions and businesses. The firm has been associated with Buckingham since 2009 through its membership in The BAM ALLIANCE, a nationwide community of independent financial advisors that engage BAM Advisor Services, Buckingham's sister company.

HORNE Wealth, led by wealth advisor Stan Purvis, CPA, CFP®, is a subsidiary of HORNE LLP, a large regional accounting firm led by Joey Havens. Following this transaction, Purvis and the HORNE Wealth team will become a part of Buckingham and assume the Buckingham name, and Buckingham will continue the wealth management business of HORNE Wealth.

This transaction will also add Nick Reiber, CPA/PFS, CFP®; Joshua Parker, CFP®; Ryan McKibben; Sherry Emerson; and Sam Stevens to the Buckingham team.

"Over the years, it's become clear that our firms have a like-minded approach to delivering highly attentive and deeply personal levels of client service," said Purvis. "We share core values and an evidence-based investment philosophy. We are excited to begin taking advantage of Buckingham's distinctive strengths to improve our clients' experience, through access to enhanced technology capabilities, industry-leading thought leadership, and more robust resources and specialists."

"We are pleased to welcome HORNE Wealth to the Buckingham family," said Adam Birenbaum, CEO of Buckingham. "Aligning our efforts will allow us to better serve our clients and help them achieve their most important financial and life goals. We accomplish these objectives through a combination of highly engaged relationships and comprehensive investment and wealth planning services. Stan and his team will be assets to our firm as a whole, helping us to enhance the client experience while adding to our exceptional talent base, which is an integral component of our long-term vision. We are honored that they are choosing to partner with Buckingham."

Bringing HORNE Wealth Advisors LLC into the Buckingham family represents another important milestone in achieving the firm's strategy of delivering the most comprehensive wealth solutions to current and future clients.



Since 2010, Buckingham has grown a national presence, now comprising 33 offices across 19 states. In 2019, Buckingham has announced six transactions (including HORNE Wealth) and also added an advisory team through a strategic hiring process.

Buckingham is a partner firm within Focus Financial Partners and the 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 advisers along with thousands of other financial advisors located throughout the country.

Photos, bios and interviews available upon request.

About Buckingham Strategic Wealth

Founded in 1994, Buckingham Strategic Wealth (“Buckingham”) helps individuals, businesses, trusts, nonprofits, retirement plans and medical practice owners achieve their most important goals by creating customized, comprehensive, evidence-based financial plans. Buckingham’s investment philosophy is rooted in an academic approach tailored to address each client’s willingness and ability to accept market risk. As a registered investment adviser, Buckingham has 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 maintains 33 offices in 19 states. For more information, visit buckinghamadvisor.com.