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## First Female President and New Chairman Named at Buckingham Strategic Wealth

Wendy Hartman and Justin Ferri partnering to lead the national wealth advisory firm

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Wendy Hartman has been named president of Buckingham Strategic Wealth (“Buckingham”), the St. Louis-based registered investment advisor (RIA) and comprehensive wealth management firm, and Justin Ferri has been named Buckingham’s chairman. Adam Birenbaum will continue as chairman and CEO of the broader Buckingham Family of Financial Services.

In her new role, Hartman will execute Buckingham’s strategic vision, leading programs and business initiatives that support Buckingham’s advisory teams as they take a dynamic, deeply personal and service-oriented approach to helping clients reach their most important financial and life goals. Hartman broadens the senior leadership team of one of the country’s largest RIAs and expands an elite group of female executive leaders in the financial services industry.

“This is an exciting time both for Buckingham and the broader industry,” Hartman said. “Our organization has experienced significant growth over the past several years, and the wealth management industry continues to evolve rapidly. Amid this change is substantial opportunity for our clients, our associates and our firm. I am extremely proud to help lead this outstanding organization into the future as we further our industry leadership and deliver ever more sophisticated wealth solutions to our clients.”

Hartman brings nearly two decades of experience to the role. She joined Buckingham in 2010 as a wealth advisor, a position in which she worked directly with clients and their families. Beginning in 2015, she was named to successive leadership roles, overseeing advisory teams and advisory team development, first in Buckingham’s St. Louis office and later across the entire firm. Most recently, as Buckingham’s managing director, she led strategic planning which guided the firm’s advisory teams and ensured consistent delivery of the overall client experience.

Hartman’s elevation to president of Buckingham will enable David Levin to focus solely on his role as chief operating officer of the broader Buckingham Family of Financial Services. Levin’s leadership has helped the firm grow in depth and breadth as the wealth management space becomes increasingly complex.

“The talent, energy, vision and experience that Wendy brings to this role are an exceptional fit for Buckingham,” said Levin. “Her passion and her deep expertise as a wealth advisor make her the perfect person to serve as the president of an RIA whose core identity involves putting clients first in everything we do.”

Hartman will focus on “what’s now” at Buckingham, partnering with Justin Ferri, who will focus on “what’s next for the firm. Ferri brings more than 20 years of financial services experience to Buckingham, joining from Focus Financial Partners where he co-led regional management and acquisition activities, helped independent RIAs with strategic planning, and led investment initiatives across the broader Focus partnership. While at Focus, Ferri was a close advisor to Buckingham as a Focus partner firm. In his role as chairman, Ferri will work closely with Hartman and the broader executive team to execute on Buckingham’s growth strategy.



“Innovation, tenacity, and a genuine passion for what is possible are all hallmarks of how I think about team culture, alignment of purpose, and how to achieve remarkable results for the clients that trust us to be their advocate,” said Ferri. “I believe that Buckingham is uniquely positioned to lead this industry forward, continuously raising the bar and standard of care that we, as true fiduciaries, bring to our clients each and every day.”

Hartman and Ferri will help drive the future phases of Buckingham’s robust growth story. Since 2010, when Buckingham attracted its first acquisition partner, the firm has grown a national presence, now comprising 33 offices and 150 advisors across 19 states. Year-to-date, Buckingham has announced six new acquisition partners and added a high performing advisory team through its strategic hiring process.

Hartman and Ferri have also joined Buckingham’s board of directors, as has Advisor Services President Mike Clinton, Chief Financial Officer Dan Anderson and General Counsel and Chief Compliance Officer Sal Papa. This growing governing body is increasingly diverse in skill set, role, tenure and talent.

“I am thrilled to welcome Wendy and Justin to their new roles,” said Adam Birenbaum, chairman and CEO of the broader Buckingham Family of Financial Services. “Not only is Wendy a seasoned and successful wealth advisor, but she is a talented communicator, a trusted colleague and has the respect and admiration of the entire the firm. Having Justin Ferri join our leadership team is more than just an incredible talent addition; I truly believe it is a game changer for our organization. I believe Justin is one of the most impressive and principled people I have ever encountered. He embodies our vision and our values. That is a powerful combination – and one that would not have occurred without our partnership with Focus Financial Partners.”

The Buckingham Family of Financial Services, a partner firm within Focus Financial Partners, is inclusive of Buckingham and its sister company, BAM Advisor Services. BAM Advisor Services is home to The BAM ALLIANCE and together serve a nationwide community of more than 300 independent RIAs along with thousands of other financial advisors.

*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 and ability to accept market risk. As a registered investment advisor, Buckingham operates under the fiduciary standard. 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](http://buckinghamadvisor.com).