Considering
Your Firm's Future

Buckingham
STRATEGIC WEALTH

Working together.

Buckingham Strategic Wealth loves building partnerships with like-minded advisors across the country. We walk step by step with prospective partners, guiding them through a process that ultimately produces firmer footing for their future, as well as the futures of their team members and clients. We partner with advisors who are growth-oriented, focused on their own succession planning, or somewhere in between.

We start by asking questions, listening to what you say, defining your ideal future and exploring what is important to you. Just as you tailor wealth management plans to fit your clients' individual situations, we work with you to create customized solution. We look forward to learning more about you, defining a path to achieve your goals, and partnering with you at Buckingham Strategic Wealth.

Experience is everything.

1 Getting To Know One Another

Personalized Exploration Process
Our experience together begins by learning about your goals, finding out what's important to your client experience and understanding what makes your firm successful.

It's a Two-Way Street
We help business owners deeply explore what can be considered one of the biggest decisions of their personal and professional lives. During this thoughtful process, we share our insights and perspectives, and focus on the things that matter most to you.

2 Designing Your Plan

Collaborative Integration Planning
Together, we consider all aspects of your firm — culture, investment policy, client experience, communication, compliance, technology and more. Our specialists work with you and your team to create a tailored integration plan that intertwines our guided approach with your goals.

Defining the Immediate Future
Your integration plan clarifies what is staying the same, what is changing and when things are happening. We define who from our team will help you along the way and when they will join the conversation. We put everything at your fingertips and keep the focus on the most important elements from one day to the next. We work how you work.

3 Integrating Into Buckingham

Sharing Our Experience
Buckingham's diverse lineup of professionals puts their areas of specialty in play for you as every aspect of your firm's integration plan is carried out on time and with minimal surprises.

Bringing It to Life
We execute on the customized integration plan before and after our transaction closes. Buckingham's dedicated teams work alongside you to ensure the details are covered and that you and your team are supported, trained and equipped to serve your clients without delay.

A Shared Belief in Evidence-Based Investing

When it comes to your clients' investments, we start and end at the same place you do: with the evidence. Our shared approach is guided by more than 60 years of objective, peer-reviewed research on how markets work, and we incorporate the latest findings from the field into our approach to building client portfolios. We lean on this evidence to increase the odds that clients will have the money they need to create the life they want.

Our Investment Policy Committee (IPC) establishes the strategy for our firm and designs a blueprint to help clients invest with confidence. The IPC analyzes volumes of research, reviews fund results, creates model portfolios and develops capital market projections. Only a handful of fund managers meet the stringent selection criteria set by our IPC, and of those, we predominantly work with:

AQR · BRIDGEWAY · Dimensional · STONE RIDGE · Vanguard

Thought Leadership

When you partner with Buckingham, clients are not just working with a single advisor. Clients are working with a whole team of experienced professionals who all share a single mission: doing what's right to help clients achieve their most important goals. That includes people like Michael Kitces, Tim Maurer, Larry Swedroe, Jared Kizer, and Jeffrey Levine. We leverage our collective experience to set a new standard for evidence-based wealth planning.

Simplify Responsibilities

You wear many hats. If you're ready to simplify your professional life, our team is here to help. Responsibilities in core areas such as compliance, finance and accounting, marketing, real estate and vendor management are transitioned to our dedicated, professional teams at Buckingham.

Amplify Culture & Expand Career Development

Our Talent & Development team has created a thriving, service-oriented culture that embraces our firm's mission, works collaboratively to achieve our strategic vision and reflects our values. We don't rest on our laurels. We actively work with our associates to build our culture, so they have customized development plans, continuous feedback, ongoing mentorship and meaningful career advancement.

Robust Commitment to Advisor Technology

We are committed to creating a streamlined, digital experience for our clients. Following extensive due diligence, we partner with innovative technology firms to create integrated systems and processes that enhance and support the entire experience for advisors and clients.

ORION · salesforce · ENVESTNET MoneyGuide · WEALTHACCESS

Key Elements of a Transaction

With over 30 associates dedicating their expertise to this process, we share our deep pool of knowledge and experiences to successfully navigate and lessen the complexities of partnering with us. We rely on a broad team inside and outside our firm to effectively integrate our new partners into Buckingham.

Client Transition Guidance

- Marketing Transition Plan
- Client Letters and Messaging
- Deep Custodial Relationships
- Diverse Digital Presence
- Dedicated, Ongoing Support

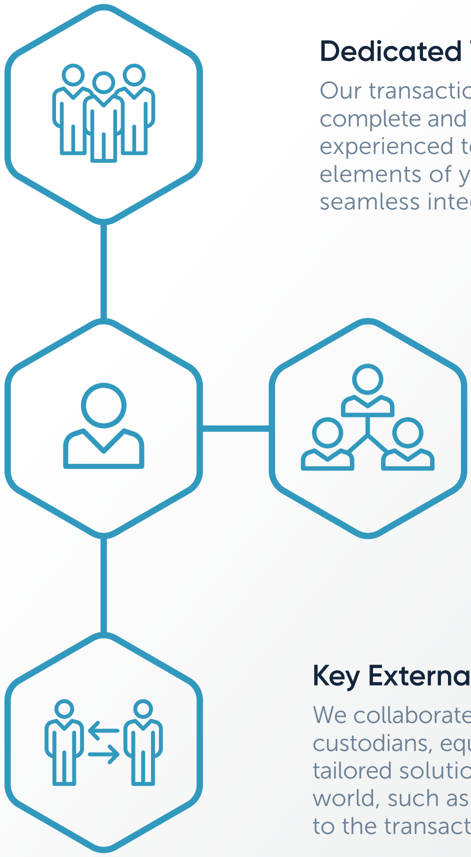
Proven Transaction Process

- Thoughtful Due Diligence
- Customized Integration Planning
- Collaborative Approach
- Diverse Team of Specialists
- Tools and Mindset That Create Clarity and Accountability

Seamless Onboarding

- Experienced, Tenured Team
- Well-Rounded, Wide-Ranging Professionals
- Custom Development Plans
- Ongoing Support

Your Buckingham Experience



Dedicated Transaction Team

Our transaction team collaborates with you to create a complete and customized experience. This passionate and experienced team of advocates will navigate the unique elements of your firm to ensure a smooth close and seamless integration for your clients and your team.

Onboarding & Integration

Our Onboarding & Integration (O&I) team serves as your go-to contact as you transition to Buckingham. The O&I team has helped integrate dozens of teams, and knows each transaction is unique. We customize the integration experience to ensure it meets your needs and agreed-upon goals and objectives.

Key External Relationships

We collaborate with your strategic relationships — landlords, custodians, equipment vendors, technology providers — to deliver tailored solutions. We also work with the key professionals in your world, such as your attorney, to bring clarity and cohesion to the transaction.

Start Your Experience

Together, we can design a transaction and integration experience that allows you to focus on what you enjoy most in your career and in your life.

Your Buckingham experience awaits.
Contact our transaction team to start your conversation.

transactions@buckinghamgroup.com