



Lumia Wealth Will Join Focus Partner Firm Buckingham Strategic Wealth, Strengthening Buckingham's Presence in Kansas City

NEW YORK, NY / ACCESSWIRE / March 2, 2022 / [Focus Financial Partners Inc.](#)

(NASDAQ:FOCS) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which [Lumia Wealth, LLC](#) ("Lumia"), a registered investment adviser located in Overland Park, Kansas, will join Focus partner firm [Buckingham Strategic Wealth, LLC](#) ("Buckingham" or "Buckingham Strategic Wealth"). This transaction is expected to close in the second quarter of 2022, subject to customary closing conditions.

Founded in 2002, Lumia offers a range of wealth advisory services to professionals, business owners, and physicians in the greater Kansas City area. Lumia is second-generation family firm which Brian Brush, CFP[®], assumed leadership for from his father-in-law and firm founder David Imhoff in 2016. Lumia has been associated with Buckingham since 2002 through its partnership with Buckingham Strategic Partners, LLC, Buckingham's affiliated comprehensive wealth platform.

"Our firms have always shared a similar client-first philosophy and we were one of the first firms to start working with Buckingham Strategic Partners about twenty years ago. Joining Buckingham Strategic Wealth was a logical progression for us in growing our business and serving our clients with the best financial tools available," said Brian Brush, CFP[®], Principal of Lumia. "We look forward to becoming part of the Buckingham Kansas City team and expanding the resources and expertise available to our clients."

Buckingham CEO Adam Birenbaum echoed that sentiment. "We are excited to welcome Brian to Buckingham. With increasing frequency, we are seeing incredibly talented young advisors like Brian joining us. Our level of support and our culture allow them to focus more of their time on their passion - helping clients, and in Brian's case also participating in the ongoing success of the business as a wealth advisor. Buckingham allows the best of both worlds."

"We are excited for Lumia to join Buckingham as our third merger in 2022," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This transaction will strengthen Buckingham's existing Kansas City presence and is another example of our expertise in helping our partners attract like-minded firms and top-tier talent."

About Focus Financial Partners Inc.

Focus Financial Partners Inc. is a leading partnership of independent, fiduciary wealth management firms. Focus provides access to best practices, resources, and continuity planning for its partner firms who serve individuals, families, employers and institutions with comprehensive wealth management services. Focus partner firms maintain their operational independence, while they benefit from the synergies, scale, economics and best practices offered by Focus to achieve their

business objectives. For more information about Focus, please visit www.focusfinancialpartners.com.

About Buckingham Strategic Wealth, LLC

Buckingham Strategic Wealth, LLC helps individuals, families, businesses, trusts, nonprofits, retirement plans and medical practice owners achieve their most important life and financial 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. Buckingham'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. Headquartered in St. Louis, Buckingham has 45 additional offices across the country. For more information, visit www.buckinghamstrategicwealth.com.

Cautionary Note Concerning Forward-Looking Statements

This release contains certain forward-looking statements that reflect Focus' current views with respect to certain current and future events. These forward-looking statements are, and will be, subject to many risks, uncertainties and factors relating to Focus' operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to Focus on the date of this release. Focus does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Focus may be found in Focus' filings with the Securities and Exchange Commission.

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