Briggs Advisory Group to Join Focus Partner Firm Buckingham Strategic Wealth, Strengthening Buckingham's Presence in the Northeast

NEW YORK, NY / ACCESSWIRE / October 24, 2023 / Focus Financial Partners Inc. ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which Briggs Advisory Group, Inc. ("Briggs" or "Briggs Advisory Group"), a registered investment adviser based in Lincoln, RI, will join Focus partner firm Buckingham Strategic Wealth, LLC ("Buckingham" or "Buckingham Strategic Wealth"). This transaction is expected to close in the fourth quarter of 2023, subject to customary closing conditions.

Briggs Advisory Group partner and wealth advisor Harold "Skip" Briggs Jr., partner and wealth advisor Christopher "Chris" Ricci and their team have used comprehensive planning and evidence-based investment management to help their clients achieve their personal financial goals. Briggs has also been an active member of Buckingham's affiliated turnkey asset management platform, Buckingham Strategic Partners, LLC, leveraging the platform's outstanding services, resources and support.

"With our firm's continued growth and the increasingly sophisticated needs of our clients, we began looking to join a firm that could provide us with the resources and thought leadership needed to meet those ever-increasing demands. As I begin my transition into retirement over the next several years, it was also important that any transaction we entered into would allow us to keep the hometown, family-friendly feel our clients have come to expect," explained Skip Briggs. "As a member of Buckingham's sister firm since 2018, we knew that joining Buckingham would support the next chapter in our firm's evolution and provide a seamless transition for our clients."

"We are thrilled to welcome Skip, Chris and the Briggs team to Buckingham," said Adam Birenbaum, CEO of Buckingham Strategic Wealth. "Because of our history together and common approach to serving clients, we knew they would be a great addition to the Buckingham family. We look forward to working with them to support their clients in Rhode Island and the surrounding Southeastern New England area for years to come."

"We are delighted that the Briggs team will be joining Buckingham, enhancing Buckingham's footprint in the growing New England wealth management market," said Travis Danysh, Head of Mergers and Acquisitions for Focus. "The well-established relationship that Briggs has with Buckingham further demonstrates the resources that Buckingham can bring to bear for similarly aligned advisory teams. This transaction also continues Buckingham's strong year-to-date momentum in the number of mergers that they have announced or completed, reinforcing their growth mindset and their ability to effectively leverage Focus' unique M&A expertise to increase their scale."

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 over 50 offices across the country. For more information, visit www.buckinghamstrategicwealth.com.

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