



Greco Capital Management Will Join Focus Partner Firm Buckingham Strategic Wealth, Further Expanding Buckingham's West Coast Presence

NEW YORK, NY / ACCESSWIRE / May 31, 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 [Greco Capital Management](#) ("Greco"), a registered investment adviser located in Bend, Oregon, will join Focus partner firm [Buckingham Strategic Wealth, LLC](#) ("Buckingham" or "Buckingham Strategic Wealth"). This transaction is expected to close in the third quarter of 2022, subject to customary closing conditions.

Greco provides fee-only independent financial planning and wealth management services to high-net-worth individuals, business owners, executives and medical professionals. The firm was founded in 2002 in Roseville, California by Jerrold ("Lex") Greco, CFP[®], CFA[®], who subsequently relocated to Bend in 2020. The firm uses an evidence-based investment approach based on rigorous academic research.

"When I first met the Buckingham team in 2011, I immediately recognized I could not have found a better match culturally," said Lex Greco, CFP[®], CFA[®], President of Greco. "As a result of our deep, long-standing relationship, now spanning more than a decade, it became clear that joining forces with Buckingham was the right decision for my firm and clients. We are perfectly aligned on investment philosophy, vision and unwavering focus on providing outstanding client service. Access to Buckingham's enhanced services and breadth of wealth management capabilities will enable me to enhance my clients' experience. I look forward to joining Buckingham's existing team in Bend, and I believe we can do exciting things together for years to come."

"We could not be more pleased to partner with Greco," said Adam Birenbaum, Buckingham CEO. "What makes our business fun is our ability to get to know great advisors like Lex and realize how much more we can achieve together. His demonstrated ability to grow a business, matched with our resources and scale, will be instrumental to achieving our goal of building a significant presence in the Pacific Northwest."

"Buckingham's merger with Greco demonstrates how we identify attractive merger candidates, with advisors of Lex's caliber, to help our partner firms enhance their growth and expand their geographic reach," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This is a strategic transaction that will provide Buckingham with an excellent opportunity to expand its Bend presence, a thriving city that is becoming central to the independent wealth management market in the Pacific Northwest."

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 the impact of the conflict in Ukraine, 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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