



Bergman Investment Management To Join Focus Partner Firm Buckingham Strategic Wealth, Further Expanding Buckingham's Presence in the San Francisco Bay Area

NEW YORK, NY / ACCESSWIRE / May 16, 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 [Bergman Investment Management](#) ("Bergman" or "Bergman Investment Management") 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.

Bergman Investment Management is a fee-only registered investment adviser located in San Mateo, California. Founded by Doug Bergman in 1995, the firm provides personalized investment advice to predominantly high net worth individuals and families. Bergman will continue to be a client firm of Loring Ward, now a part of Buckingham Strategic Partners, LLC, Buckingham's affiliated comprehensive wealth platform, until the transaction closes.

"My clients have trusted me to help build their financial futures throughout the years," said Doug Bergman. "The time has now come for me to plan for the long-term continuity of that trusted fiduciary advice. As a client firm of Buckingham Strategic Partners, I have experienced Buckingham's commitment to deeply personal client service firsthand. I am confident that Buckingham will continue to deliver the level of service my clients expect and deserve."

"We are thrilled that Doug has chosen Buckingham as his succession partner," said Adam Birenbaum, CEO of Buckingham. "Given Doug's long-standing association with Buckingham Strategic Partners, his clients will benefit from years of trust and collaboration. We believe our common investment philosophies, focus on the client experience, and commitment to always doing the right thing will result in a seamless transition for Doug's clients."

"The Bergman transaction demonstrates Focus' expertise in succession planning," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This transaction will strengthen Buckingham's growing Bay Area presence while also providing a great solution for clients given the two firms' shared history and cultural alignment."

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 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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