# Davis Financial Planning to Join Focus Partner Firm Buckingham Strategic Wealth, Expanding Buckingham's North Carolina Presence to Asheville

**NEW YORK, NY / ACCESSWIRE / February 17, 2023 /** 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 Davis Financial Planning, LLC ("DFP"), a registered investment adviser based in Asheville, NC, 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 2023, subject to customary closing conditions.

DFP is a financial planning firm founded in 2010. It provides personalized and comprehensive financial planning and advisory services to individuals and families, as well as tax planning and preparation services. DFP tailors its services to its clients' individual financial needs and objectives. This transaction adds an experienced advisory team to Buckingham's existing North Carolina presence.

"We have been looking at options to evolve our services, enhance our technology and increase our community engagement while continuing to provide our clients with the excellent service they expect and deserve," said Al Davis, Founder and Senior Financial Planner at DFP. "We needed a partner that would allow us to focus on what we do best - helping our clients plan for all of their life changes. Buckingham is the perfect cultural fit for our team."

"We are delighted to partner with Al and the DFP team, who similarly share our passion to serve through doing what's right for our clients," said Adam Birenbaum, CEO of Buckingham. "With their experience and commitment to client service and their broader Asheville community, they are the perfect fit to expand our footprint in North Carolina."

"We are pleased that Davis Financial Planning will be joining Buckingham allowing them to expand into Asheville, which is an important wealth market in North Carolina," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This addition will not only add a talented team of advisors to Buckingham but will also further solidify its position as a leading wealth manager with a national footprint. This transaction is another example of how our scale and deep M&A expertise benefit our partner firms as they broaden their capabilities and accelerate the growth of their businesses."

**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 50 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 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.

**Investor and Media Contacts**

Tina Madon
Senior Vice President
Head of Investor Relations & Corporate Communications
Focus Financial Partners
P: +1-646-813-2909
tmadon@focuspartners.com

Charlie Arestia
Vice President
Investor Relations & Corporate Communications
Focus Financial Partners
P: +1-646-560-3999
carestia@focuspartners.com

**SOURCE:** Focus Financial Partners Inc.

View source version on accesswire.com:
https://www.accesswire.com/739833/Davis-Financial-Planning-to-Join-Focus-Partner-Firm-Buckingham-Strategic-Wealth-Expanding-Buckinghams-North-Carolina-Presence-to-Asheville