



Hausman Advisors to Join Focus Partner Firm Buckingham Strategic Wealth, Broadening Buckingham's Presence in the Pacific Northwest

NEW YORK, NY / ACCESSWIRE / March 16, 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 [Hausman Advisors, LLC](#) ("Hausman"), a registered investment adviser based in Hood River, OR, 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.

Formed in 2008 by Jason Smith and Karen Hausman Smith, Hausman integrates personalized financial planning with evidence-based investment strategies, and primarily serves clients working in technical and scientific disciplines. Hausman has been associated with Buckingham since 2012 through its partnership with Buckingham Strategic Partners, LLC ("Buckingham Strategic Partners"), Buckingham's affiliated turnkey asset management platform.

"Karen and I spent our early careers in the scientific arena," explains Jason Smith, Managing Principal of Hausman. "We firmly believe this background enables us to provide differentiated perspectives to our clients, and tailor the life and financial planning that we do to their individual circumstances. We share Buckingham's evidence-based investment philosophy and unwavering commitment to client service. That's how we knew they would be an ideal fit for our firm."

"Through Buckingham Strategic Partners, we have had the pleasure of working with the Hausman team for the past decade and have a very strong relationship with them," said Adam Birenbaum, CEO of Buckingham Strategic Wealth. "Both of our firms share a deep commitment to client service and evidence-based advice. For all of these reasons, we couldn't be more thrilled to have them join our advisory team. Their backgrounds add a unique element to their ability to serve their clients and we look forward to helping them grow their footprint in Northern Oregon."

"We are delighted that Hausman will join Buckingham, further expanding Buckingham's presence in Oregon," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Hausman's principals and their clients will immediately benefit from Buckingham's broad wealth management resources, while sharing a common investment philosophy. The breadth of our partnership enables founders and teams to join forces with industry-leading firms that share their client-service philosophies and cultural values. This is a terrific example of our strategic M&A capability bringing like-minded advisory teams together."

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.

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