



# The Planned Approach Will Join Focus Partner Firm Buckingham Strategic Wealth, Expanding Buckingham's Presence in Missouri

**NEW YORK, NY / ACCESSWIRE / September 21, 2021 / [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 [The Planned Approach, Inc.](#) ("TPA"), a registered investment adviser located in Kansas City, Missouri, 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 2021, subject to customary closing conditions.

Founded in 2002 by Stephanie Guerin, CFP® and Kelly Hokanson, CFP®, TPA is a fiduciary firm offering wealth management services to professionals, retiring business owners, executives, and other high net worth clientele in the greater Kansas City area and elsewhere in Missouri.

"With Stephanie and Kelly, we have found a like-minded, client-focused team with a strong and growing presence in their local market. They also share our approach to evidence-based financial planning and wealth management," said Justin Ferri, Buckingham's Chief Operating Officer. "Partnering with the TPA team will enable us to further expand our presence in Missouri, serving more clients and neighbors with fiduciary advice in the communities where we live and work."

"This decision was about synergy. It was about finding the most effective way to help us grow our firm while further enhancing our ability to serve great clients the right way," explained Stephanie Guerin, CFP®, Co-Founder of TPA. "This transaction allows us to maximize our capabilities and quality of planning much faster than if we were to continue building our firm independently. At the same time, we are excited to offer Buckingham our unique perspective as a firm led by women advisors in Kansas City for almost 20 years."

"Buckingham shares our deep client-first mindset. Their dedication to life planning - considering the whole client - reinforces that we have found the right home, but even stronger and more capable," added Kelly Hokanson, CFP®, Co-Founder of TPA.

"We are thrilled that TPA has chosen to join Buckingham in Focus' 16th merger year-to-date," said Rudy Adolf, Founder, CEO and Chairman of Focus. "This transaction will strengthen Buckingham's presence in Missouri and establish their first office in Kansas City, an important market for our partnership. This transaction also represents Buckingham's third merger this year, a testament to their ability to attract like-minded and highly talented firms like TPA."

DeVoe & Company, a leading investment bank and consulting firm to RIAs, acted as financial adviser to TPA.

**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](http://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 43 additional offices across the country. For more information, visit [www.buckinghamstrategicwealth.com](http://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, without limitation, uncertainty surrounding the current COVID-19 pandemic, 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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