LifePlan Financial Advisory Group to Join Focus Partner Firm Buckingham Strategic Wealth, Expanding Buckingham's Physical Presence to the Detroit Area

NEW YORK, NY / ACCESSWIRE / October 24, 2023 / Focus Financial Partners Inc. ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which LifePlan Financial Advisory Group, LLC ("LifePlan" or "LifePlan Financial Advisory Group"), a registered investment adviser based in Rochester Hills, MI, 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 2023, subject to customary closing conditions.

Founder Keith A. Barr, partner Catherine S. Gearig and the team at LifePlan Financial Advisory Group provide evidence-based investment management and financial planning services to help clients preserve and grow their assets while honoring their personal goals.

"We have always been committed to creating the best possible wealth journey for our clients," explained Keith Barr. "I founded this firm because I knew there were better ways to serve clients and opportunities to develop a more comprehensive wealth management experience. By joining Buckingham, we can build on the work I started over 20 years ago, tapping into their top-tier support, services, and pool of talent. As a part of Buckingham, we can focus even more time on client relationships, continuing the small-town feel our clients know and love, while drawing upon the resources of a large firm."

"LifePlan is a great fit with Buckingham's culture, associates, and values. Much like us, their team focuses on creating solid financial plans, building strong relationships, and always putting the clients' best interest first," said Adam Birenbaum, CEO of Buckingham Strategic Wealth. "We are excited to help the LifePlan team expand upon their services and client base in Southeast Michigan."

"We are thrilled that the LifePlan team is joining Buckingham," said Travis Danysh, Head of Mergers and Acquisitions for Focus. "The addition of well aligned advisory talent continues to bolster Buckingham's growth and solidify their position as the premier home for evidence-based RIAs. We remain excited to support their growth with our M&A expertise and resources."

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 over 50 offices across the country. For more information, visit www.buckinghamstrategicwealth.com.

Media Contact

Travis Danysh
Managing Director, Head of Mergers and Acquisitions
Focus Financial Partners
P: +1-512-498-7083

SOURCE: Focus Financial Partners Inc.