



Oxford Financial Partners Will Join Focus Partner Firm Buckingham Strategic Wealth, Establishing Buckingham's First Office in Cincinnati, Ohio

NEW YORK, NY / ACCESSWIRE / January 6, 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 Siena Capital, LLC, d/b/a [Oxford Financial Partners](#) ("Oxford" or "Oxford Financial Partners"), an investment adviser based in Cincinnati, OH, will join Focus partner firm [Buckingham Strategic Wealth, LLC](#) ("Buckingham" or "Buckingham Strategic Wealth"). This transaction is expected to close in the first quarter of 2023, subject to customary closing conditions.

Oxford Financial Partners is a wealth management firm which follows a systematic approach for delivering personalized financial planning and investment advice to primarily high net worth individuals. Upon closing of this transaction, the Oxford Financial Partners team will join Buckingham, establishing Buckingham's first office in the attractive Cincinnati market.

"Our firm believes in prioritizing people over portfolios," said Erik Christman, Managing Member of Oxford. "We want to continue focusing on building strong relationships with our clients while honoring their long-term financial plans. By joining Buckingham, we can draw from their expansive resources, talent and national footprint to positively impact the lives of our clients now and in the future, all while retaining the personalization of a local firm. We are thrilled to have this opportunity to enhance our client experience."

"Like Buckingham, the team at Oxford is driven by a people-first philosophy," said Adam Birenbaum, CEO of Buckingham. "We look forward to leveraging our operational scale to add to their high-touch wealth management experience and to establishing our footprint in the metro Cincinnati area and beyond."

"We are delighted that Oxford Financial Partners will join Buckingham," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Strategic transactions like these reflect Focus' differentiated M&A capabilities, and are mutually beneficial for both clients and advisors. Oxford's clients will benefit from Buckingham's broad resources and wealth management expertise. The Oxford team will benefit from shared knowledge and greater bench strength. Buckingham will add a talented team to its growing, national platform as it enters the important Ohio wealth management market."

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 48 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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