



Wasserman Wealth Management to Join Focus Partner Firm Buckingham Strategic Wealth, Expanding Buckingham's Presence in Michigan

NEW YORK, NY / ACCESSWIRE / January 19, 2024 / [Focus Financial Partners](#) ("Focus"), a leading partnership of independent, fiduciary wealth management firms, announced today that it has entered into a definitive agreement under which Wasserman Wealth Management, LLC ("Wasserman Wealth Management" or "Wasserman"), a registered investment adviser based in Farmington Hills, MI, 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 2024, subject to customary closing conditions.

Since 2003, Wasserman has utilized Buckingham's affiliated comprehensive wealth management platform, providing resources, back-office management, thought leadership and a broad toolbox of personalized services, to help their clients achieve a greater sense of financial comfort and security. Managing Member Brad Wasserman, CPA, Member Keith Rybak, CPA and the rest of the Wasserman team currently provide investment management and financial planning advice to clients across the country.

"We pride ourselves on strong client relationships and we are especially honored that generations of families have entrusted us with their financial futures," shared Brad Wasserman. "We are always looking for new ways to serve our clients, and making the move to join Buckingham was the logical, natural step in the evolution of our firm. Because of our long-tenured partnership with their affiliated platform, we knew Buckingham shared our beliefs, investment strategies and core values. We are excited and confident this move will help us support our clients' financial growth and the development of our firm, now and for years to come."

"Welcoming a new team into the Buckingham family is always exciting, but it's even more special when long-time members of our Buckingham Strategic Partners community join the firm," said Adam Birenbaum, Chairman and CEO of Buckingham Strategic Wealth and Buckingham Strategic Partners, LLC. "We share such a deep history with Brad, Keith and the rest of their team, it is a natural fit and we look forward to supporting them as they serve clients in the Detroit metropolitan area and across the country."

"We are delighted that the Wasserman Wealth Management team is joining Buckingham," said Travis Danysh, Head of Mergers and Acquisitions for Focus. "We have seen Buckingham successfully attract like-minded teams to their organization for many years due to their strength in providing fee-only wealth management services. We believe they are well-positioned to have another strong year in M&A."

About Focus Financial Partners

Focus Financial Partners 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 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.

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