



# **Siena Investments Will Join Focus Partner Firm Buckingham Strategic Wealth, Establishing Buckingham's Presence in Michigan**

**NEW YORK, NY / ACCESSWIRE / August 23, 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 Siena Capital Management, LLC, d/b/a Siena Investments ("Siena"), a registered investment adviser with offices in Grand Ledge and Williamston, Michigan, 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 2000 by Roger Millbrook and Stephen Hicks, Siena is a fee-only fiduciary firm offering wealth management services to executives and other professionals, business owners, and retirees and their families in the greater Lansing, Michigan area and beyond. Siena has been associated with Buckingham since 2000 through its partnership with Buckingham Strategic Partners, LLC, Buckingham's affiliated comprehensive wealth platform.

"We have known Roger and Stephen for more than 20 years as they have leveraged our advisory solutions platform to deliver excellent service to their clients," said Justin Ferri, Chief Operating Officer of Buckingham. "There has always been a natural cultural and philosophical fit between our firms through our shared approach to evidence-based financial planning and wealth management. We foresee that the addition of Siena will provide us with significant opportunities to serve more clients as we continue to grow our presence in Michigan."

"At Siena, we work every day to create confidence among our clients that we are taking every facet of their financial lives into account when helping them plan for the future," said Roger Millbrook, Co-Founder of Siena. "We know that focusing on data, research and evidence over emotions helps our clients safeguard their wealth and achieve their goals." "We're confident that joining Buckingham will only deepen our commitment to our clients by enabling us to build on the passion and focus we bring to delivering an outstanding client experience," added Stephen Hicks, Co-Founder of Siena.

"We are delighted that Siena will join Buckingham," said Rudy Adolf, Founder, CEO and Chairman of Focus. "Siena's clients will benefit from gaining access to Buckingham's broad resources and deep expertise. The diversity of our partnership enables founders and teams to enhance the services they can offer their clients by joining a firm that is not only an industry leader but shares their cultural values and client service philosophy."

## **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**

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 44 offices in 22 states. 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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