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# THE BUCKINGHAM FAMILY OF FINANCIAL SERVICES SURPASSES $12 BILLION IN ASSETS

Planned growth and succession strategy includes merger with Wealth Management Consultants and appointment of new CEO.

(St. Louis — October 4, 2010)
The Buckingham Family of Financial Services, a partner firm of Focus Financial Partners, today announced a merger with Wealth Management Consultants, LLC ("WMC"), a Sonoma County-based independent wealth management firm. Buckingham also announced they are continuing to execute their succession plan for Buckingham Asset Management with the transition of Adam Birenbaum to CEO.

The Buckingham Family of Financial Services, whose firms collectively advise on over $12 billion in assets, was recently selected to the 2010 Inc. 5000 list, a list of the 5000 fastest growing private US companies. Buckingham Asset Management was ranked #2 in the Midwest on InvestmentNews' 2010 survey of the leading Registered Investment Advisor firms.

**Merger With WMC**
Buckingham's strategic merger with Wealth Management Consultants fits the firm's goals to become the leading passive investment firm and was conducted with the guidance and resources of Focus Financial Partners.

Bert Schweizer III, Buckingham's co-founder and chairman said, "We are delighted to be joining forces with the talented WMC team. WMC presents an excellent opportunity to broaden the geographic reach, scope and scale of our combined wealth management services to individuals, businesses, trusts, not-for-profits and retirement plans."

WMC, which manages approximately $400 million, was co-founded by industry veteran Irwin "Irv" Rothenberg more than twenty years ago. Like Buckingham, WMC is a longtime proponent of Modern Portfolio Theory and passive investing, believing that client goals are best reached by an investment strategy designed to consistently take market gains while limiting investment costs. In addition, Rothenberg helped to build Buckingham's sister company, BAM Advisor Services, a turnkey asset management platform that offers support services for Registered Investment Advisor firms and CPAs with an emphasis on passive investing. WMC will maintain its name and continue to be led by Irv Rothenberg, Thelia Eagan and Brent Thomas.

Said Rothenberg, “I’ve put my passion and joy into building client relationships over the past two decades. We know the Buckingham team intimately through our work together over the past decade and couldn’t be more certain that our combined staff and clients will benefit immensely from joining forces. I’m excited about leveraging Buckingham’s extensive technology platform and capabilities so that my team and I can spend even more time serving our clients.”

**Buckingham in Final Stages of CEO Transition**
Adam Birenbaum will be succeeding Bert Schweizer III as CEO. The transition of the CEO responsibilities will allow Schweizer to focus on his role as chairman of the firm and continue his role as an advisor to Buckingham clients.

Buckingham announced to employees last year that Birenbaum will fully transition to the CEO role in January 2011. He has worked for Buckingham for seven years, most recently occupying roles as principal, assistant to the chairman, chief compliance officer and legal counsel for The Buckingham Family of Financial Services. Birenbaum, 32, earned a juris doctorate from the Saint Louis University School of Law and a bachelor’s degree in history from Vanderbilt University in Nashville, Tenn. He has also earned the Accredited Investment Fiduciary designation.

Birenbaum plans to continue growing Buckingham as an industry leader through current business development activities as well as a growing emphasis on acquisitions and recruiting. “With Focus’ expertise and resources in facilitating deals, Buckingham is actively looking to continue partnering with Focus to bring on the nation’s top firms that meet our rigorous standards and strict investment philosophy. Quite simply, we are looking to create the center of the passive universe at Buckingham.”

Rudy Adolf, CEO and founder of Focus Financial Partners, said, “As the leading partnership of independent wealth management firms, we continually look to invest in the growth and continuity of our firms. Buckingham, one of the preeminent firms in the industry, is a shining example of how we partner together with our firms to execute on a well-conceived strategy.”

**About The Buckingham Family of Financial Services**
Based in St. Louis, The Buckingham Family of Financial Services includes Buckingham Asset Management, LLC, BAM Advisor Services, LLC and BAM Risk Management, LLC. The Buckingham Family is led by a team of 10 principals and manages or administers more than $12 billion in client assets. Its investment approach centers on modern portfolio theory and passive investing primarily through use of Dimensional Fund Advisors (DFA) funds and Buckingham’s proprietary fixed income portfolio design and execution capabilities. Through Buckingham Asset Management, the company provides fee-only investment management for individuals, businesses, trusts, not-for-profits and retirement plans. As a turnkey asset management provider, BAM Advisor Services helps like-minded registered investment advisor firms, often associated with CPA practices, start, build and manage their advisory organizations. For more information, please visit http://www.investmentadvisornow.com/

**About Wealth Management Consultants**
WMC specializes in servicing high net worth families located mostly in and around Sonoma County, Calif. The company provides 150 family relationships with holistic financial planning and investment management services. For more information, please visit: http://www.wealthmc.com/page5.html

**About Focus Financial Partners**

Focus Financial Partners, LLC, is the leading international partnership of independent fiduciary wealth management firms. With over $36 billion and more than 650 employees and partners, Focus partners provide wealth management, benefit and investment consulting services to individuals, families, employers, and institutions. Clients benefit from Focus' partners independence, unrivaled access, and continuity. Focus principals maintain their entrepreneurial independence; benefit from the synergies, scale, economics, and best practices of the market leader; and achieve an eventual, smooth ownership transition. For more information, please visit www.focusfinancialpartners.com.

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