
Experience
is everything
Buckingham
STRATEGIC WEALTH

Picture it: peace of mind.

Imagine having the freedom to focus on the things that you enjoy.

We are passionate about helping you with every aspect of your financial life.

When you work with a Buckingham advisor:

You achieve **clarity**.

You can live your life in the "now," and when you think about the future you can have the confidence you'll end up where you want to be.

You feel **empowered**.

Know your financial strategy incorporates layers of evidence and is designed around your true needs and wants.

You gain a **partner**.

Work with a fiduciary advisor who puts your interests first and gets to the core of your values and goals to collaborate as life happens.

We are Buckingham Strategic Wealth, a growing community of advisors, financial professionals and people like you who believe that when our lives are guided by a sound plan, we can achieve great things.

The essence of our approach to serving you is to always act in your best interests.

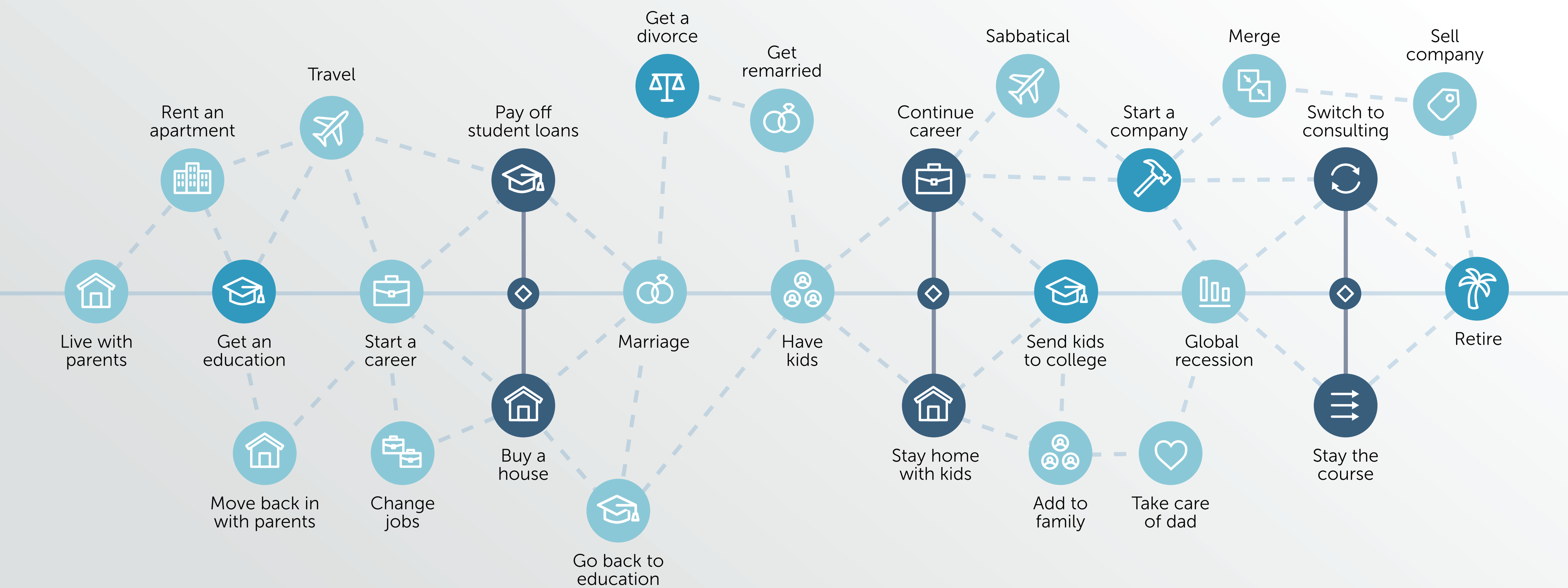
This means making recommendations based on decades of peer-reviewed financial research. It means putting your best interests at the center of our planning approach. It means getting to know you, your family, your goals and your most important dreams. All to craft a plan that embraces – and improves – the most important aspects of your life.

A clear path on life's winding road.

Life isn't linear:

Your plan shouldn't be either.

Navigating your finances through each phase of life requires more than just a plan. **It requires a partner.** Our advisors are with you through every step acting as a trusted confidant and fearless guide—your first phone call when something happens.



We’re different, and so are you.

Life changes, we evolve.

Your life is layered with significant events and nuanced circumstances that can influence your future. You can rely on us to keep your plan on track, anticipate your future needs and help you navigate life’s complexities with ease.

Design | Build | Protect®

First, we embark on a personal discovery process to uncover what’s important to develop a strategy addressing your values, priorities and goals.

With academic research and financial science as the foundation, we tailor a plan that’s right for you, with distinct objectives and attainable action items.

Then, we continually and proactively adjust your plan to adapt to your personal situation and ever-changing financial landscape.

Your experience is everything to us.

Your strategy begins with you.

What do you really want? To support your favorite causes? To send your children or grandchildren to college? To feel confident you have enough?

Our planning approach is centered around your life: your goals, your dreams and the impact you want to make on this world.

The Elements of a Financial Strategy

We plan from the top down. Your dreams and passions are too important to leave up to chance. Our collaborative network of advisors serves as a think tank, where a kinetic mix of passion, drive and diverse professional experience come together to benefit our clients.

Money, goals, life, and impact — our guidance transcends investment decisions. We believe that your experience should build upon the basics and encompass every aspect of your life when building a solid financial plan.

Envision a financial future filled with less guesswork and more science.

Your portfolio is no doubt an important driver of your overall financial plan. In response, we start and end with evidence. Our approach is guided by decades of objective, peer-reviewed research on how markets work.

The strategies in your investment plan are risk-optimized, cost-effective and tax-efficient to enhance your odds of living the life you've imagined.

We are enthusiastic, unapologetic advocates of evidence.

We love working with data. We construct our portfolios out of diversified stock funds; high-quality bonds; and, in some cases, alternative investment strategies. We help you control what you can in your investments: taxes, costs and risk.

We put our best minds to work. Our committee-based approach to investment policy and advanced financial planning strategies is rooted in academia. We selectively apply only rigorous, peer-reviewed research to drive our investment and financial planning policies.

Across the nation and in your neighborhood.

National presence on a first-name basis.

Your advisor collaborates with colleagues from offices around the country; each embody wide-ranging technical and intellectual insight. No silos here. Our team of advisors is on call to support, inform and advise you.

Our culture is rooted in teamwork. We believe in collaboration, not competition. Sharing our knowledge ensures we address every aspect of your life.

Our firm has a national reach. With dozens of offices across the country, as of Dec. 31, 2023, Buckingham managed $25.47 billion on a discretionary basis and $1.56 billion on a non-discretionary basis for a total of $27.03 billion assets under management. In addition, Buckingham provided services to $1.28 billion of participant-directed retirement plan assets. In the aggregate, the total number of assets under management or administration was $28.31 billion.

We are educators. Whether it's publishing books, writing papers for established journals or appearing in the national media, we care about sharing our insights with those who need it most.

Who's on your team?

Your Advisory Team
Our advisors are out front, visible and reachable. We spend our time strengthening relationships by asking and answering questions, and we are always available to provide support and guidance.

The Broader Buckingham Family
Our firm's network of advisors share investment planning and insights with each other so you always benefit from the latest knowledge.

Other Professionals
We collaborate with industry leaders and strategic partners to deliver a well-rounded financial planning experience. We work closely with your other professional advisors, such as attorneys and CPAs, to ensure your strategies are cohesive.

Ready to Start Your Buckingham

Experience?

Experience a sense of calm

and confidence when you collaborate with your advisor to create a plan that's right for you.

Experience a rational way to invest and plan

with a financial plan guided by decades of objective research.

Experience the best of both worlds

The personal touch of an advisor partner backed by national thought leadership resources and intellectual insight.

What You Pay

In addition to being fiduciaries who always work in your best interest, we are proudly fee-only. We do not receive compensation or commission for selling products. This model ensures we are always on the same side as our clients.

From the start, your advisor will provide clear and transparent pricing information aligned with your unique scenario. We price our services on various factors, including your personal financial situation and assets managed; at each incremental breakpoint, you pay less on the dollar.

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