BUCKINGHAM STRATEGIC PARTNERS
Alex Potts
President

Buckingham opened its doors with only 3 financial advisors and with a core belief that solving client's complex problems came before investing in the back-office and paperwork. This white-glove ideology was unique at that time.

In a way, they adopted a concept from the way health care worked: first comes the diagnosis then comes the treatment.

There were very few businesses that were really like us and now sometimes I can't believe that we're now a $50 billion across the whole company.

We thrived off the idea that if clients can hire and fire the advisors, the advisors can turn around and hire and fire us at any time.

And so, we had to provide great service or we were out. That still drives everything we do. If we can keep taking work off the plate that makes it easier to spend more quality time with your clients, we're doing something right.

Buckingham STRATEGIC PARTNERS

Buckingham Strategic Partners • 8182 Maryland Ave Ste. 500, Saint Louis, MO 63105
www.buckinghamstrategicpartners.com

Buckingham Strategic Partners (BSP) is dedicated to helping advisors grow their practices. Our offering of wealth management solutions help maximize advisors' time with clients by minimizing the daily demands of running a business. When an advisor joins our community, they join our network of like-minded peer advisors and gain access to a team that supports their work with investment and planning resources, coaching and more.

While Buckingham's wealth of resources provides both breadth and depth to our advisor community, our specialists who work as an extension of your staff and our bench of well-recognized thought-leaders support you on your journey to success. As a part of Buckingham Strategic Partners, you gain access to industry authorities to help you navigate unique client situations and implement advanced planning strategies to serve even your most complex cases. You will collaborate with a dedicated team of Buckingham professionals to offload time consuming back-office work.

Founded in 1997 and headquartered in Saint Louis, Missouri, Buckingham Strategic Partners offers a comprehensive advisor platform where we serve as your partner, helping you every step of the way. We work with advisors from across the country and are dedicated to bringing science, reason and innovation to investing.

Buckingham's portfolio management programs are tailored to the unique needs of individuals. Our Asset Class Investing philosophy combines decades of market data, Nobel Prize-winning academic research and the latest discoveries in behavioral finance.

We invite you to learn more about how we are helping advisors like you. For more information on Buckingham Strategic Partners, please visit **www.buckinghamstrategicpartners.com.**

New business contact:
Steve Atkinson, Managing Director, Advisor Relations
Phone: 669.226.6302
E-mail: satkinson@buckinghamgroup.com

Brand of program: Buckingham Strategic Partners is part of the Buckingham Wealth Partners family
Type of program: TAMP+ Envestnet and Orion platforms
Total assets in program: $34.77 billion as of June 30, 2023
Year program began: 1997
Managers on platform vetted: Yes
Managers GIPS® compliant: No
Type of products available: Asset class portfolios: DFA, DFA Socially Responsible Investing, DFA Sustainable Portfolio, DFA Tax-Managed Portfolios, ETF Portfolio, Multi-Manager Portfolio, SMAs all across seven classes of risk: defensive, conservative, balanced, moderate, moderate growth, cap appreciation & equity
Program uses platform to track reporting of client holdings: Yes; Envestnet and Orion platforms
Program is compatible for: Fee-based advisors
Program optimizes for tax and trading efficiency: Yes
Sleeve-level reporting: No
Program links to a trade execution or order management system: Yes
Program links to a trust accounting system: No
Private branding or white labeling possible: Yes
Proposal generator: In-house proposal development tools
Generates investment policy statements: Yes
Asset allocation methodologies: Capital Markets Assumptions (CMA) process coupled with Mean-Variance Optimization (MVO) using Morningstar's Asset Allocation portfolio optimization tool
Rebalancing: Executed as needed, with most portfolios rebalanced at lease quarterly
Aggregation of held-away accounts: Yes
Custodians supported: Multiple: Schwab, Fidelity, TD & Pershing Advisor Solutions
Marketing support offered: Yes