NEWS

For Immediate Release

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Loring Ward to Merge with BAM Advisor Services

Both Firms Focused on helping Advisors Deliver Exceptional Client Experiences

San Jose, Calif. (September 27, 2018) Loring Ward has agreed to join forces with BAM Advisor Services, part of the Buckingham Family of Financial Services. This merger represents the coming together of two industry leaders in the Advisor Services industry.

After the closing of the merger, which is anticipated for later in 2018 and subject to customary closing conditions, the combined organization will serve more than 300 Registered Investment Advisors (RIAs) along with thousands of Financial Advisors across the United States who, collectively, serve tens of thousands of individual clients.

But it's a story of much more than numbers. This merger represents the uniting of similar cultures, seasoned leadership, talented teams, and a wide-range of operational, investment, and practice management offerings that help Financial Advisors achieve more for their businesses and deliver more for their clients.

Buckingham Family of Financial Services CEO Adam Birenbaum and Loring Ward CEO Alex Potts have shared a professional comradery for many years. The fact that it's evolved into a true partnership is something that will benefit associates and clients of both organizations. Potts says, "I have admired all that Adam and his team have done over the years to help Advisors. We are thrilled to have found a partner who, like us, built a business model focused on putting others' needs first and helping Advisors deliver an exceptional experience to their clients."

The joining of forces between BAM Advisor Services and Loring Ward will address a central challenge for today's Financial Advisor. "In today's climate, adding value to end clients' lives requires offering far more than just investment management. It demands delivering a wide-ranging, holistic client experience enabling clients to plan and solve for life's most complex financial challenges," says Birenbaum.

By joining forces, Advisor clients of BAM and Loring Ward will benefit from the depth of each business knowledge and experience, the ability to leverage that knowledge through their content and technology platforms, and the close-knit community of Advisors who share best practices with each other every day.

Birenbaum noted the support and depth of resources Focus Financial Partners provided to lead the transaction process and drive it forward to fruition. "It would be impossible to imagine us making this happen were it not for our colleagues at Focus Financial Partners. "They worked in close coordination with Loring Ward and us to move this process forward and achieve this great outcome."

Added Birenbaum, "Our shared mission, experience and respective strengths mean when it comes to BAM and Loring Ward, one plus one can equal three. We cannot wait to see where this union takes us, our team, and the Advisors we serve."

Loring Ward was advised by Raymond James & Associates on this transaction.

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About Loring Ward
Loring Ward (LWI Financial Inc.) is committed to creating a better wealth experience for Financial Advisors and their clients across the U.S. Since 1990, the firm has strived to do this by empowering Advisors with Investment and Advisor Solutions that can help increase the probability of delivering a great experience for their clients. It has a large network of independent Advisors in the United States and is located in Silicon Valley, California. Loring Ward's Asset Class Investing philosophy is based on more than nine decades of data, analysis and research, insights from behavioral finance, and close relationships with leading academics, including Loring Ward Investment Committee Members Dr. Meir Statman and Nobel Laureate, Dr. Harry Markowitz. For more information, please visit www.loringward.com

About BAM Advisor Services
For more than 20 years, BAM Advisor Services has served as a leading Turnkey Wealth Management Partner, dedicated to helping RIA-based wealth Advisors deliver independent, holistic wealth management, investment, and planning solutions to individuals, families, and organizations. The organization is based in St. Louis, MO and is part of the Buckingham Family of Financial Services, which includes Buckingham Strategic Wealth, a Registered Independent Advisory firm with more than 25 locations across the United States. For more information, please visit www.bamAdvisorservices.com.

About Focus Financial Partners Inc.
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 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, please visit https://focusfinancialpartners.com.