

NEWS

For Immediate Release

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Loring Ward Hosts 24th Annual National Education Conference
*Focus on Delivering Comprehensive Advice as Top Advisors Hear from
All-Star Line-up of Experts*

San Jose, Calif. (October 23, 2018) [Loring Ward](#) held its annual National Education Conference September 30-October 3 in San Francisco for more than 170 independent Advisors. The Conference focused on how Advisors can leverage tools, resources, and insights to differentiate their practices and provide even more comprehensive advice.

One of the highlights of the conference was the opportunity to hear more about the recently announced merger between Loring Ward and The Buckingham Family of Services (“Buckingham”). Alex Potts, Loring Ward CEO, and Adam Birenbaum, Buckingham CEO, shared their vision of what the year-end merger (subject to customary conditions) of the two firms could mean for Advisors.

“One of the things that we are most excited about is that both companies have always been committed to doing the right thing for our clients,” said Alex Potts. “We believe we can help even more people by merging.”

Conference attendees also heard compelling main stage presentations, including from Michael Kitces, publisher of the blog *Nerd’s Eye View*, on *The Future of Advice*; Dan Roam, bestselling author, on *Illustrating Your Story*; and Mick Ebeling, technology trailblazer, author, and entrepreneur on *Not Impossible*.

The conference also included a Technology Center, featuring a virtual reality tour of the Office of Tomorrow; a Collaboration Lab, where attendees could ask questions of various Loring Ward specialists and outside experts; and a special Experience Walk around San Francisco, where Advisors toured innovative companies to see and learn how they are creating a better client experience.

During the Conference, Loring Ward also presented Loring Ward Investment Committee Member Meir Statman with its *Heritage Award* in recognition of how his perspective and insights have helped shaped the firm’s investment approach. Past winners of the Loring Ward *Heritage Award* include Harry Markowitz, Nobel Prize recipient and member of the Loring Ward Investment Committee; David Booth, Executive Chairman and Founder of Dimensional Fund

Advisors; Dan Wheeler of Dimensional Fund Advisors (retired); and Alan Werba, John Bowen, and Carl Reinhardt, Loring Ward's founders.

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. For more than 25 years, 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.

We have a large network of independent Advisors in the United States and are 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.

As of October 21, 2018, Loring Ward has \$16.5billion in assets under management. For more information, please visit www.loringward.com.

All named third party companies are unaffiliated with LWI Financial Inc.

LWI Financial Inc. ("Loring Ward") is an investment adviser registered with the Securities and Exchange Commission. R18-297 (10/20).