Experience is everything.
Imagine having the freedom to focus on the things that give you energy.

We have spent decades studying the markets, planning approaches and tax strategies — so you don’t have to.

When you work with a Buckingham advisor:

You achieve **clarity**.
Live your life now, and when you think about the future, be confident you’ll end up exactly where you want to be.

You feel **empowered**.
Know your financial strategy incorporates layers of hard 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 specialists 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 what decades of peer-reviewed financial research has shown to be the right way to invest. It means relying on proven financial planning strategies. 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.

Picture it: peace of mind.

You feel empowered.
Know your financial strategy incorporates layers of hard 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.
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.

Life isn't linear:
Your plan shouldn't be either.
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.

First, we embark on a personal discovery process to uncover what’s important so we can design a plan customized to address your deepest wants and needs.

With academic research and financial science as the foundation, we build a plan that’s the perfect fit, with distinct objectives and attainable action items.

Then, we protect your plan by checking in to measure progress toward your goals and adjust as needed.
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 unique evidence-based 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 bottom up. Your dreams and passions are too important to leave up to chance. Our offices serve as think tanks, 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, fees 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 entire team of specialists is on call to support, inform and advise you.

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

Our firm has a national reach. With dozens of offices across the country and $14.05 billion (as of March 2020) in assets under management (AUM), we leverage our size and relationships with our custodial and fund management partners to help keep your fees low.

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 are always available to provide support, and guidance.

The Broader Buckingham Family
Our firm’s network of innovative specialists share investment and planning insights with our advisors so you always benefit from the latest knowledge.

Other Professionals
We collaborate with industry leaders and strategic partners to deliver some of the best-in-class services at lower costs. We work closely with your other professional advisors, such as attorneys and CPAs, to ensure your strategies are cohesive.
Experience a sense of calm
and confidence when you collaborate
with your advisor to create a plan that’s
right for you.

Experience a smarter way to
invest and plan
with a financial plan infused with decades
of evidence-based 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.

Ready to Start Your Buckingham
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