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CONTACT:
Grace Vogelzang or Corrine Smith
Impact Communications, Inc.
913-649-5009
ImpactMediaManager@ImpactCommunications.org
CorrineSmith@ImpactCommunications.org

Buckingham Advisors Celebrates 35th Anniversary

Plus: Upcoming webinar will recap 2022 and what may lie ahead in 2023 for the economy

Dayton, Ohio [November 15, 2022] – Buckingham Advisors, an Ohio-based independent financial advisory firm that provides investment management, financial planning, tax, and business services, is celebrating its 35th anniversary. The company was founded in 1987 by Ohio-native Jay Buckingham, who left a large corporation in order to offer truly independent financial advice to clients.

“I started my business in a small, upstairs loft with a slanted ceiling and a staff of one,” said Buckingham. “My goal was to follow my own sense of integrity and to change more lives. I knew I’d have a better chance of doing just that if I became my own boss.”

35 YEARS OF SUCCESS

Fast forward 35 years and Buckingham Advisors has grown to a staff of more than 40, with assets under management of $650 million. Buckingham’s team of strategists, investors, accountants, and advisors works with individuals, families, and business owners to help them achieve financial success. The staff includes a large number of credentialed specialists including, Certified Financial Planner™ professionals (CFP®), Certified Public Accountants (CPA®), Chartered Financial Analysts (CFA®), and investment, insurance and tax professionals.

As in 1987, Buckingham Advisors is still headquartered in Dayton, Ohio. However, there are now four office locations: Dayton, Columbus, Lebanon, and Wilmington. The firm offers comprehensive financial planning, investment management, business services, and tax strategies for clients in Ohio and beyond.

In addition to financial planning, the firm offers financial literacy and educational programs. Buckingham Advisors provides a library of written and video content that addresses investment markets as well as a range of financial planning, tax, and business topics.

UPCOMING WEBINAR: 2022 RECAP AND WHAT MAY LIE AHEAD IN 2023 FOR THE ECONOMY AND MARKETS

The company also holds in-person and virtual events, including their upcoming webinar to recap 2022 and share their thoughts on what may lie ahead in 2023 for the economy and markets. As the end of the year approaches, this is the perfect time to assess financial planning and tax opportunities, portfolio moves, the Fed and interest rates.

Details About the Webinar

When: Tuesday, December 6, 2022, 1:00 pm – 1:45 pm ET

Topic: Year End Wrap Up & Thoughts for the Year Ahead

Discussion will include:

- Financial Planning Strategies from 2022 and ideas for 2023
- Tax Planning & Considerations for this year and next
- 2023 Tax Brackets and Contribution Limits
- Portfolio Moves from 2022 and Considerations for 2023
- Discussion on the Fed and Interest rates from this year and into next

Speakers:

- Ryan P. Johnson, CFA, CFP®, Managing Director of Investments
- Nicole T. Strbich, CFP®, CPWA®, EA, Managing Director of Financial Planning

No-Cost Registration:
There is no cost for the webinar. Journalists, Buckingham Advisor clients and business owners are welcome and encouraged to attend.
Click to register: https://register.gotowebinar.com/register/1158304040994209295

ONE COMMON GOAL

"Our team works together with one common goal: to create successful outcomes for our clients," stated Buckingham. "It's humbling and inspiring to see how much we've grown over the years," continued Buckingham. "It's all due to the meaningful client relationships and referrals. Our clients aren't just clients, they're family."

Managing Principal, Linda S. Parenti, CFA®, adds: "We are so very blessed to be working with such good people, doing good work for so many individuals, families and businesses. We love what we do – and I truly think it shows."

GIVING BACK TO THE COMMUNITY

The company is dedicated to giving back to the community. In 2019, "Buckingham Big Hearts" was established by employees to provide group opportunities for philanthropic involvement within the communities where they live and work. Quarterly events – which are open to employees, clients, and friends of Buckingham Advisors – can involve donations, volunteer work, and other activities to support local businesses, individuals, and families. For more information, visit the "Buckingham Big Hearts" page on the company's website.

To view a more in-depth Fiduciary Profile of Jay Buckingham and Buckingham Advisors, visit FiduciaryVoices.com.

ABOUT BUCKINGHAM ADVISORS

Ohio-based Buckingham Advisors is a unique team of professionals that work together to create professional and personal financial success for their clients. Buckingham's professionals are fiduciaries, putting their clients' needs ahead of their own. The company's core purpose is to improve the lives of clients by providing clarity, simplicity, and the professional expertise of Buckingham's financial planners, investment professionals, tax strategists and accounting team. Buckingham specializes in aligning the solutions clients need to help them achieve the best possible financial and life outcomes. The firm offers personal and business financial solutions, providing one team for all their clients' financial needs. A complimentary, initial consultation is available for prospective clients (no cost or obligation). For more information visit MyBuckingham.com.

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