



For Immediate Release

DeVoe & Company Represented The Planned Approach in its Sale to Buckingham Strategic Wealth

San Francisco, September 21, 2021 – DeVoe & Company, a leading investment bank and consulting firm serving the RIA industry, is honored to have advised the Planned Approach in its sale to Buckingham Strategic Wealth. Buckingham Strategic Wealth is part of Focus Financial Partners, a leading partnership of independent fiduciary wealth management firms, where it manages more than \$23B.

Kansas City-based the Planned Approach is an all female firm serving clients with \$2MM or more in investable assets. Within 20 years, Partners Stephanie Guerin, Kelly Hokanson and Staci Peterson have developed a unique offering for serving their clients, who have an average of \$2.5 million with the Planned Approach. Buckingham is the ideal partner for the Planned Approach, providing a full range of operational, technology, and support functions to complement their comprehensive planning approach.

“We quickly saw the importance that the Buckingham organization places on culture and client relationships,” said Hokanson. “We’re confident that Buckingham will offer us more time and ways to deepen the comprehensive support we offer to our clients, including the strong bonds we build with high net worth female clients.” More than 75% of the Planned Approach’s clients are women or have women as the financial decision-maker.

Buckingham CEO Adam Birenbaum added, “We share The Planned Approach’s passion to serve successful individuals and their focus on women. We are excited to welcome Stephanie, Kelly, Staci and their team into the Buckingham family. Their close-knit approach to client relationships and outstanding client experience will benefit our mutual clients over time.”

“We were honored to have guided the Planned Approach to finding an ideal strategic partner,” said David DeVoe, Founder and CEO, DeVoe & Company. “As The Planned Approach continues on its growth path, the team and their clients will benefit from Buckingham’s expansive resources, and Buckingham will benefit from the niche experience of The Planned Approach team.”

“There is a very limited chance we would have found such an amazing firm to join if we had not hired DeVoe & Company,” said Guerin. “It was definitely one of the best decisions we made in this very exciting and meaningful process. We are so grateful to their entire team.”

This transaction is the tenth by DeVoe & Company in 2021.

About DeVoe & Company

DeVoe & Company is an investment bank and goal-based consulting firm focused exclusively on guiding wealth management and investment management companies to a higher level of success. The firm provides consulting, M&A and valuation services to help RIAs accelerate the achievement of their business goals. For more information, visit www.devoeandcompany.com.

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