



For immediate release

DeVoe & Company Advised Madison Wealth Advisors in Joining Buckingham Strategic Wealth

San Francisco, May 25, 2023 – DeVoe & Company, a leading strategy and M&A consulting company serving the RIA industry, is honored to have supported Madison Wealth Advisors in joining forces with Buckingham Strategic Wealth.

Madison Wealth has been using the back-office and investment services of Buckingham (and its predecessors) since its inception 20 years ago. Joining forces was a natural next step.

“Since the creation of Madison Wealth Advisors, we have utilized the expansive resources of Buckingham’s sister firm, Buckingham Strategic Partners (including its predecessors), to handle the behind-the-scenes legwork so my staff and I can focus on providing strong financial advice to our clients,” shared Doug Clark, Managing Member, Madison Wealth. “Because of our long-standing relationship and the resulting confidence we have in Buckingham, the next logical step in expanding the services and offerings of our firm was to join forces.”

“As a longtime partner with Madison Wealth, we are excited to take our relationship to the next level,” added Adam Birenbaum, CEO of Buckingham Strategic Wealth. “Their focus on helping clients meet their financial goals by enhancing, protecting, transferring and donating wealth aligns with our deepest values and strongest commitments. We look forward to further supporting the team for many more years as they serve their clients in western Missouri.”

This is DeVoe & Company’s fourth transaction of 2023.

About DeVoe & Company

DeVoe & Company is a goal-based investment bank and consulting firm focused exclusively on the wealth management industry. The company’s consulting, M&A and valuation services provide help RIAs accelerate the achievement of their business goals. For more information, visit www.devoeandcompany.com.

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