

News

BCLP ADVISES ON BUCKINGHAM STRATEGIC WEALTH AND THE COLONY GROUP MERGER, MARKING MILESTONE IN WEALTH MANAGEMENT

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BCLP Partner Todd Kaye was mentioned in [St. Louis Business Journal](#) regarding his representation of Buckingham Strategic Wealth LLC in its merger with The Colony Group, leading to the formation of Focus Financial Partners— a new entity in the wealth management sector. The combined firm will boast nearly 1,200 employees and operate from 90 offices nationwide, managing a substantial asset portfolio. The merger is set to finalize on July 1, 2024.

Pre-merger, Buckingham Strategic Wealth managed \$28.8 billion in assets, while The Colony Group handled \$21.4 billion, as per recent Securities and Exchange Commission filings. Post-merger, A Focus spokesperson indicated an asset management total exceeding \$50.2 billion based on their most recent regulatory findings.

Todd serves as the Global Practice Group Leader for Corporate Transactions. His practice focuses on mergers and acquisitions, securities law, corporate governance and general corporate matters.

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MEET THE TEAM



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