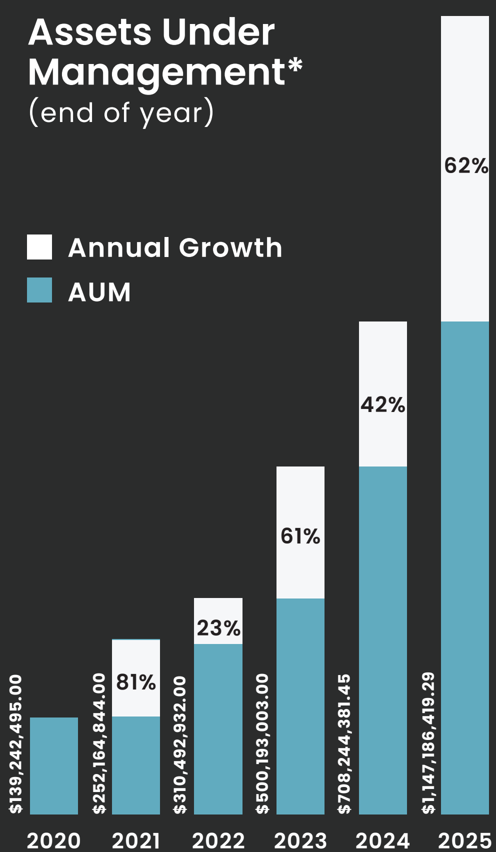
A FOCUS ON GROWTH

Case Study: Aerodigm Wealth, LLC

"Focus Partners Advisor Solutions has enabled me to focus on the parts of the business that I enjoy and I'm good at. I don't think I would have been able to effectively build the operations and infrastructure quickly enough on my own. Thus, this has freed up my time on business growth including ... moving up market and focus on competing against bigger name brands."

Jared Siegel, BFA™, CEPA®
Partner & Chief Development Officer, Aerodigm Wealth, LLP

Assets Under Management*
(end of year)



*Aerodigm Wealth, LLC joined as an independent member of the Focus Partners Advisor Solutions community in May 2020. Aerodigm's AUM over a four-year period ending on December 31 of each year. Source: www.adviserinfo.sec.gov/ AUM growth is unique to Aerodigm and others can't expect same or similar AUM growth. Growth is based on multiple factors such as market movement, clients onboarded, AUM of each client, and other unique factors to Aerodigm.

The Challenge:

Aerodigm Wealth, an established public accounting firm, opened a wealth advisory division in 2017. Following a few years of growth, in 2019, the firm's leadership realized that they needed **additional solutions to capture potential growth.**

Our Solution:

To create more time and space to serve clients, Aerodigm leveraged Focus Partners Advisor Solutions' (Focus) suite of offerings to enable them to focus on business growth objectives while still providing a high standard of wealth management experience. **Focus took over back-office management, investment models, practice solutions, and day-to-day custodial management,** allowing the Aerodigm team to focus on building strong relationships with their highest-quality clients and grow their firm. In addition, having access to Focus' Advanced Planning Team and Systematic Sub Committee (formally Investment Policy Committee) and their insights, strategies, and review of financial regulations was a game changer for the firm.

Scan to hear more about Jared's experience.

FOCUS

Who We Are

We do more than streamline your back office—we empower financial advisors to elevate their practice and client relationships. Our suite of personalized, scalable solutions goes beyond a traditional TAMP, combining research-driven investment strategies, best practices, and hands-on support tailored to your needs. Whether you're looking to optimize operations, grow your firm, or enhance your client service, we're here to support every stage of your journey. With Focus, you'll gain the freedom to focus on what matters most: helping deliver exceptional value to your clients while building a sustainable future for your business.

Who We Serve

We partner with both seasoned advisors who are running substantial fee-based practices as well as startup firms with solid business plans focused on providing personal, comprehensive wealth planning. Collectively, Focus serves financial planners looking to make a difference in their clients' lives.

Why Partner With Us?

Our Core Solutions Are All Inclusive

When you work with our team, you receive a suite of solutions designed to help power your dream practice.

A Planning Team At Your Fingertips

Centered on your client's goals and fueled by decades of peer-reviewed research and the industry's thought leaders, we help you create personalized plans based on reliable information and strategies.

A Network of Learning Opportunities

Our learning groups are designed to inspire robust peer-to-peer learning, creating a systematic and dynamic personal and professional development platform.

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Nearly
1000
Advisor Network*

315+
Advisors With Us Over 15 Years*

$50B
AUM/AUA**

25+
Years Serving Advisors*

* As of 4/30/2026, there are 983 independent members of the Focus Partners Advisor Solutions community, with 316 members being a part of the community for over 15 years. Prior to January 2025, Focus Partners Advisor Solutions was named Buckingham Strategic Partners, LLC.

** A of December 31, 2025, Focus Partners Advisor Solutions ("Focus") had $19.49 billion of discretionary regulatory assets under management and $16.91 billion of non-discretionary regulatory assets under management. In addition, Focus provides administrative, back office and retirement plan services to $14.09 billion of assets managed or advised by the independent firms that hire Focus for its services. In the aggregate, the total number of assets under management or administration was $50.59 billion.

Services are offered through Focus Partners Advisor Solutions, LLC ("Focus"), an SEC registered investment adviser. Registration with the SEC does not imply a certain level of skill or training and does not imply that the SEC has endorsed or approved the qualifications of Focus or its representatives. Prior to January 2025, Advisor Solutions was named Buckingham Strategic Partners, LLC. Focus has been part of the Focus Financial Partners partnership since 2007.