FOCUS

A FOCUS ON GROWTH

Case Study: SSB&T Wealth Management

> It's hard to imagine us outgrowing Focus Partners. The tools, resources, network, and people provide efficiency and best-in-class offerings for our clients and prospects. The cherry on the top is how they care for my team. We are simply better across the board due to this partnership.

Edward Kramer, CFP®
President
SSB&T Wealth Management

The Challenge:

Security State Bank & Trust (SSB&T), a Texas community bank for over 80 years servicing central Texas, wanted to expand their business into the wealth management space. To begin the process, they vetted several firms, engaging with bank leadership to ensure their outsourcing partner fit their needs. Their stated goal was a partner to help them develop, launch, and implement a marketing strategy to grow their business.

Our Solution:

To create more time and space to expand their services, SSB&T leveraged Focus Partners Advisor Solutions' (Focus) suite of offerings to streamline their processes, increase efficiency, and create tailored plans for every client. Focus took over back-office management, investment models, practice solutions, and day-to-day custodial management, allowing the SSB&T team to focus on building strong relationships with their highest-quality clients and growing their firm. Focus provided business consulting, coaching, and training for SSB&T, all with a goal to equip the team with the knowledge and tools to support their professional success.

In addition, having direct access to Focus' Advanced Planning and Investment teams' insights, strategies, and review of financial regulations provided SSB&T with expanded resources and knowledge to support their current client and future client base.

Assets Under Management*

$119,623,531.57
MARCH 31, 2025

business consulting • training
custodial management • marketing
practice solutions • investment models
back-office management • coaching

$0
JANUARY 1, 2024

*SSB&T Wealth Management joined as an independent member of the Focus Partners Advisor Solutions community in January 2024. January statistics as of January 31, 2025. Source: www.adviserinfo.sec.gov/. AUM growth is unique to SSB&T Wealth Management 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 SSB&T Wealth Management.

SSB&T has not been paid for their name, likeness, or quote and is being provided solely as a case study to demonstrate the services Focus offers to advisors. SSB&T is an independent member of the Focus Partners Advisors Solutions community, uses the Focus Partners Advisor Solutions services, and therefore has incentive to provide good feedback. The above quote represents the experience of SSB&T, experiences will vary. SSB&T CPA's was not the only independent Focus Partners Advisor Solutions advisor chosen to participate in these case studies.

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.

** As 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.