Buckingham
STRATEGIC PARTNERS

2023 Events and Conferences

Introduction

Buckingham Strategic Partners' goal is to equip advisors with the tools, processes and preparation needed to build successful relationships with their clients. With that in mind, we host several events throughout the year, bringing together our partner advisors to learn and grow as a community. Our educational events provide advisors with the latest insights from industry thought leaders, as well as various opportunities to network with like-minded advisors.

We hope these events give you the chance to exchange practical tips and share knowledge. Most importantly, we want you to have all the resources necessary to create actionable plans at your firm. Whether you're looking for a refresher on Evidence-Driven Investing™, seek communications support and techniques to engage clients, or simply enjoy encountering new ideas, our thought leaders and industry resources will share the information you need.

Ongoing Resource Events

E-Summit

August 8-10, Virtual

E-Summit is an annual virtual experience delivered over a few days each summer. It is geared toward learning and incorporating best practices in delivering a great client experience, applying evidence-driven planning and investing insights, and exploring new ways of improving your business. The content will be a mix of online training sessions paired with live opportunities to interact with instructors and advisors within the Buckingham community.

- Curriculum focused on the latest evidence on investment strategy, life planning and wealth planning conversations, led by Buckingham's Investment Strategy team and Evidence-Driven Planning Committee
- Learn at your own pace through a mix of online training sessions paired with live opportunities to interact with instructors and peers
- Advisors and staff can participate for the most up-to-date access to the resources available to them through their Buckingham partnership
- Content suited for all audiences (advisors and staff)

Frequency: Once a year

eSUMMIT

Ongoing Resource Events

Office Hours

Office Hours provide advisors direct access to Buckingham's thought leaders who specialize in a variety of areas including investments, financial planning and client experience.

- Sit in on frequent sessions for the latest support and guidance
- Ask your questions in a live Q&A format with subject matter resources
- Content geared toward relevant and timely trends, headlines, updates, etc.

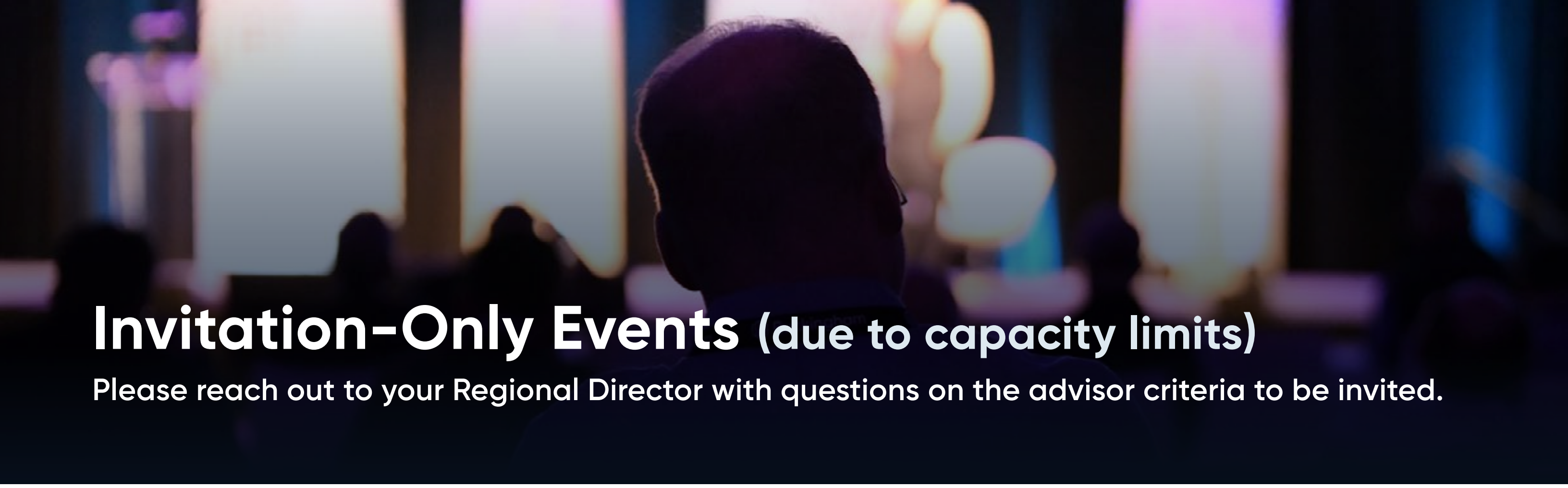
Frequency: Bi-weekly

Strategic Partner Webcasts

Strategic Partner Webcasts offer advisors direct access to Buckingham's strategic partners and resources.

- Sit in on frequent sessions with our strategic partners, addressing industry trends and providing information about their offerings
- Ask your questions in a live Q&A format

Frequency: Monthly



Invitation-Only Events (due to capacity limits)

Please reach out to your Regional Director with questions on the advisor criteria to be invited.

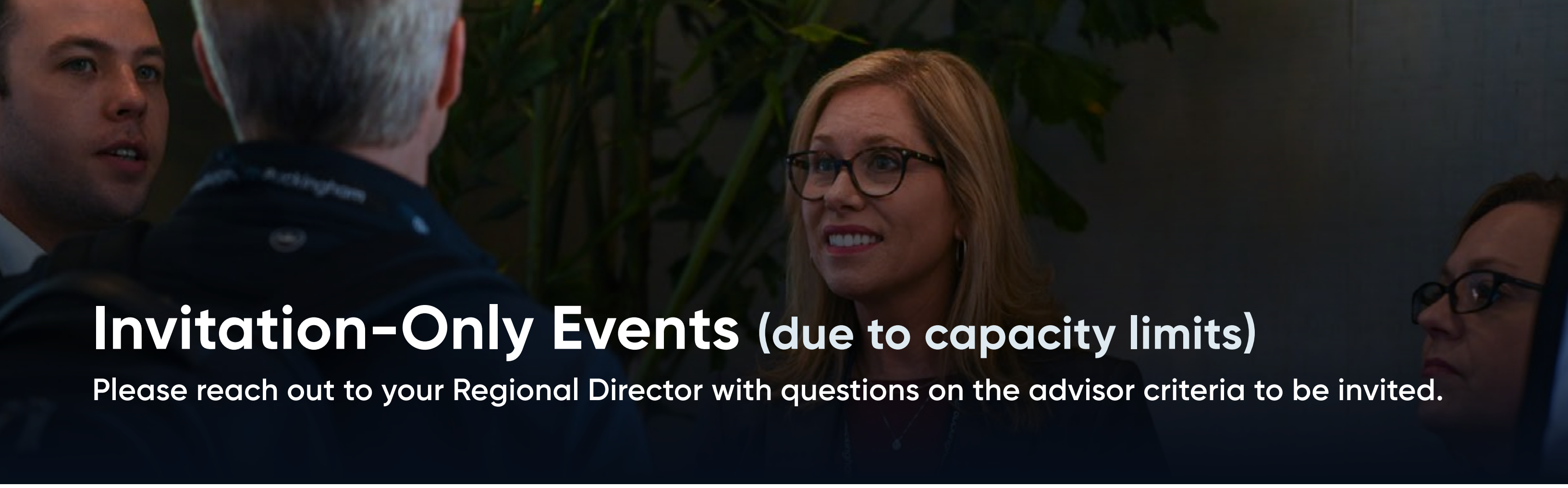
Partners Meeting

April 30–May 3 in Colorado Springs, CO and October 22-25 in St. Louis, MO

The Partners Meeting conference is offered twice annually and is geared toward expanding your business in the areas of client experience, business valuation and overall company impact. Currently, participation in Partners Meeting is by invitation only.

- Learn how to maximize your impact with clients, enhance your firm's overall value and build an enriched life for those you engage
- Leverage the depth of internal thought leadership balanced with insights from external industry resources
- The curriculum — both timely and timeless — focuses on financial planning, investment management, client experience, practice management and industry trends
- Best suited for advisors and business owners most engaged with their Buckingham partnership

Frequency: Twice a year



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Learning Groups

January 23-26 in Austin, TX and July 24-27 in Park City, UT; with virtual gatherings throughout the year

Learning Groups provide a personal and professional development opportunity based on ongoing small-group, peer-to-peer experiential learning. Intended for established, growth-minded advisors, the experience is anchored by two annual meetings. The curriculum of each study group will include a half day of Admired Advisor education and discussion; a half day with industry leaders; and a full day of discussion and problem solving with your peers on current business challenges for the group or individual firms. Currently, participation in Learning Groups is by invitation only.

- Interact with established, growth-minded advisors looking to share knowledge and latest thinking across a range of topics
- Share best practices and problem solve with your peers on current business challenges for the group or individual firms
- Revisit and discuss Admired Advisor educational concepts
- Best suited for decision-making advisors or business owners

Frequency: Twice a year

LEARNING GROUP

If you have any questions, please reach out to events@buckinghamgroup.com.