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Buckingham Asset Management & BAM Advisor Services announces selection of inStream wealth management technology platform

*Planning-centric software will support more than 370 Buckingham/BAM advisors
at more than 140 Client Firms*

St. Louis, MO - October 20, 2014 – Buckingham Asset Management/BAM Advisor Services, one of the country's largest independent wealth management enterprises, has chosen the inStream planning-centric wealth management software platform to serve the more than 370 advisors representing the more than 140 client firms in its network. The strategic partnership was announced today at the BAM Alliance 2014 Annual Conference.

Cloud-based inStream was developed by a financial advisor for financial advisors, whether they're in the largest firms or independent practices. inStream lets advisors increase time spent with their clients while also increasing business capacity, enhancing the human connection at a time when "robo-advisor" products are focused on minimizing the human role. That was the appeal for Buckingham and BAM Advisor Services, organizations built around a personal relationship with each client. Buckingham/BAM advisors will each have access to inStream as part of its turnkey suite of support software.

"We believe that great financial advice comes from a high quality advisor who is supported by an up-to-date client financial plan that the advisor relies upon for daily guidance of their conversations. inStream provides exactly what we believe will propel wealth management to the next level and will enable Buckingham advisors and BAM clients to consistently deliver the highest quality advice," said Jeff Remming, Chief Operating Officer for Buckingham/BAM. "inStream is clearly at the leading edge of technology available to today's wealth managers," added Remming.

"We couldn't have hoped for greater validation of inStream's value to financial advisors than to have been selected by Buckingham and BAM," said John Wotowicz, Executive Chairman of inStream. inStream founder Alex Murguia added "Whether an advisory firm is large or small, success is still ultimately determined by the strength of client relationships and service. We developed inStream to allow firms of all sizes to empower their advisors, not to bypass them, and to enable them to develop the best possible relationships and deliver the best possible service."

inStream combines world-class financial planning capability with a wide variety of analytics and an easy-to-use interface to enable advisors to proactively deliver current, relevant and consistent advice to all of their clients throughout the year. A complete "annual review" for all of an advisor's clients is performed every single evening, telling advisors which clients to call and what to discuss with them. Buckingham/BAM joins Mercer Advisors among inStream's growing list of enterprise clients.

About inStream

Designed by an advisor, inStream is an innovative, cloud-based financial planning and wealth management platform that is quickly revolutionizing the way advisors deliver advice, and redefining how they manage their practice. inStream's fully integrated platform provides advisors with simple yet robust planning capabilities, proactive guidance alerts, and a variety of practice management tools aimed at helping advisors scale their practice, increase client satisfaction and grow their business. inStream empowers advisors to deliver a great client experience with more timely and relevant wealth management advice by performing a complete "annual review" for all of an advisor's clients every single evening, telling advisors which clients to call, and what to discuss with them. Additional information can be found at [REDACTED]

About Buckingham

Buckingham provides comprehensive wealth management and financial planning services to individuals, businesses, trusts, not-for-profits, medical professionals and retirement plans. Its investment approach centers on modern portfolio theory implemented through passively managed mutual funds and Buckingham's fixed income portfolio design and execution capabilities. Buckingham manages or administers more than \$6 billion in assets. Headquartered in St. Louis, Buckingham has offices in Dallas, TX, Burlington, IA, Indianapolis, IN and Irvine, Cupertino and Santa Rosa, CA. In addition to its wealth management arm, Buckingham includes BAM Advisor Services, LLC and BAM Risk Management, LLC. Additional information can be found at [REDACTED]

About BAM Advisor Services

BAM Advisor Services is a turnkey asset manager provider for more than 140 Registered Investment Advisor firms with combined assets under management or administration of more than \$17.6 billion as of September 30, 2014. BAM Advisor Services delivers to its community of firms, known as THE BAM ALLIANCE, comprehensive wealth management solutions and support along with a unique support network defined by strong personal relationships and world-class service. Additional information can be found at [REDACTED]

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