LPL Financial and Triad Financial Strategies Welcome Lincoln Kopetski and Joe Cilley

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CHARLOTTE, N.C., March 14, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Lincoln Kopetski CFP® and Joe Cilley CFP® have aligned with Triad Financial Strategies (Triad), an existing LPL firm supported by its broker-dealer and hybrid registered investment advisor platforms. The advisors managed approximately $100 million of client brokerage, advisory and retirement plan assets*. They join from U.S. Bancorp Investments.

"LPL is our welcome to the 21st century," said Cilley, who was previously affiliated with LPL from 2002 to 2011. "The investments they have made in their technology and other solutions played a big part in our decision. Having access to these resources makes our job easier and helps us work more efficiently. And with the recent enhancements to pricing, we feel we are better positioned for long-term growth. We felt this is the best partnership for us, to get the support of the Triad team with the backing of LPL."

Triad is based in Issaquah, Wash., and now includes six financial advisors. The team's approach to financial guidance is centered on three core areas: client education, financial planning and wealth management.

Tait Lane, Triad founder and president, said, "Our goal at Triad Financial Strategies is to build relationships with our clients and gain their trust so we can help them get to the financial goals they have for their lives. LPL's partnership really makes a difference in our ability to be successful. Their scale enables us to cost-effectively deliver high value to our clients, and it also helps us attract talented advisors like Joe and Lincoln, who bring over 38 combined years of experience."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "Advisors like Joe, Lincoln and the entire Triad team play such an important role in their clients' lives. Recognizing the amount of time and effort that goes into their work, our goal is to make it as easy as possible for them to manage their business, giving them more time and more resources to serve their clients. We will continue to differentiate our firm in the market by making investments in the technology, tools and resources that help advisors optimize efficiency and maximize growth."

More information about Triad Financial Strategies can be found on their website Triad-fs.com.

Read about other firms that recently joined LPL in the News and Media section of LPL.com.

About LPL Financial
LPL Financial (https://www.lpl.com) is a leader in the retail financial advice market and the nation's largest independent broker-dealer**. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.

*Based on prior business. Reported assets have not been independently and fully verified by LPL Financial.

**Based on total revenues, *Financial Planning* magazine June 1996-2018

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