LPL Financial

LPL Financial and Good Life Financial Advisors Welcome Firenze Wealth Management

Apr 2, 2019

CHARLOTTE, N.C., April 02, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that advisors Carrie Mullins, Sara Tanner, Susan Perry, Sierra Swidrak, Davis Siliga and Kalin Rooney of Firenze Wealth Management (Firenze) have joined LPL Financial. Firenze has aligned with Good Life Companies (Good Life), an enterprise firm offering support and resources for advisors leveraging LPL Financial's broker-dealer and corporate or hybrid registered investment advisor platforms. The advisors at Firenze reported that they managed approximately $390 million of client brokerage, advisory and retirement plan assets*. They join from Foresters Financial.

The firm was founded by two women, Tanner and Mullins, who have a collective 50 years of experience in the financial services industry. Firenze was hatched during a trip to Florence, Italy in 2017, as the women became inspired by the multifaceted insights that influenced the Renaissance. They take a similar approach to financial guidance, offering holistic financial planning and wealth management services with a focus on education in serving their clients.

"LPL's culture fits with our values and we believe they are the best choice to help us provide our clients with objective advice in the independent model," said Tanner. "With LPL we get access to best practice solutions that can promote our growth, and our partnership with Good Life supports our commitment to community outreach. They share our focus to do work that is for the greater good of the community."

Serving the Pacific Northwest with their office located in the Portland-Metro area of Oregon, the firm's six advisors, including five women, along with a dedicated staff, serve a client base primarily made up of those working in public service, including teachers, police officers and fire fighters. Believing that giving back and fostering goodwill supports forward momentum, they offer public seminars on financial planning to empower financial health for the community.

"We are ecstatic to have the Firenze team join our community of advisors at Good Life," said Conor Delany, CEO, Good Life Companies. "Carrie and Sara are natural leaders who were born to be entrepreneurs. We are lucky that they have chosen Good Life as their vehicle to get them there and we are proud of our partnership with LPL. At Good Life we help advisors go into business for themselves, but not by themselves. Together we can provide the support to help achieve success in the independent model."

"We extend a warm welcome to the Firenze team and congratulate the Good Life team on their continued growth," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "We understand what it takes for advisors to succeed in the independent space, and we are committed to making investments in the technology, resources and capabilities that make that possible. We wish the Firenze team much success as they launch their business and pursue meaningful work in support of their clients and their community."

Learn how LPL supports women advisors with opportunities to connect with other women advisors and build a business without gender limits.

Read about other firms that recently joined LPL in the LPL Financial 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 and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets and client numbers have not been independently and fully verified by LPL Financial.
**Based on total revenues, *Financial Planning* magazine June 1996-2018
LPL Financial, Good Life Companies, and Firenze Wealth Management are separate entities.

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Source: LPL Financial Holdings, Inc.