LPL Financial Welcomes O&R Partners

Apr 11, 2019

CHARLOTTE, N.C., April 11, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that O&R Partners, made up of financial advisors Dave Olivieri CFP® and Wes Rowlands, has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors reported having managed approximately $155 million of client brokerage, advisory and retirement plan assets*. They join from VOYA Financial.

"We needed a larger broker-dealer to help support our growth. LPL has the size and stability that can address the advancing needs we have to execute on our growth strategy," said Rowlands. "When you include the robust technology that LPL offers advisors, it sets up for success, simplifying the day-to-day interactions with clients and allows us to focus on wealth management strategies that can add value to our clients' financial futures."

Olivieri has over 40 years of experience and has built his client base primarily through referrals. Rowlands has worked with Olivieri for seven years, and prior to that his experience has been in finance and consulting on Wall Street. Based in Laguna Hills, Calif., the advisors are supported by Chris Olivieri and Gillian Macey, and the firm takes a team approach to supporting clients. "We have helped many of our clients retire, supporting families through major transitions and extending our expertise to second and third generations," said Olivieri. "Our goal is to help our clients live fulfilled in retirement and follow through in all financial stages of their lives."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Dave and Wes to the LPL family and are proud to serve as a partner to their firm. We are committed to supporting their success by offering personalized support as they make this transition to our independent platform and by continually investing in an integrated technology platform with the wealth management resources and capabilities that can help them deliver value to their clients and work toward their growth goals."

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.

Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.
*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 and O&R Partners are separate entities.

Connect with Us!

https://twitter.com/lpl
https://www.linkedin.com/company/lpl-financial
https://www.facebook.com/LPLFinancialLLC
https://www.youtube.com/user/lplfinancialllc

Media Contact:
Lauren Hoyt-Williams
(980) 321-1232
Lauren.Hoyt-Williams@lpl.com

Source: LPL Financial Holdings, Inc.