LPL Financial

LPL Financial Welcomes Brookshire & Brookshire Wealth Management

May 23, 2019

CHARLOTTE, N.C., May 23, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that father-son practice Brookshire and Brookshire Wealth Management has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. Brent and BJ Brookshire, father and son, respectively, reported having served approximately $100 million of client brokerage and advisory assets*. They join from Merrill Lynch.

Brent Brookshire began his career in his family's grocery business, where he worked for 13 years before moving to financial services. For 20 years he has been a financial advisor and retirement planner at Merrill Lynch, and is now "thrilled to be powered by LPL Financial," Brent Brookshire said. "It came down to offering and opportunity to better serve our clients. LPL offers a platform that allows us the freedom to provide objective financial guidance to our clients. They also offer technology that lets us run our business efficiently and has the scalability to help us expand our firm."

Based in Lufkin, Texas, Brookshire & Brookshire Wealth Management was built to serve clients. They work with business owners, families and individuals and are committed to fostering client relationships and building lasting trust. As a father-son team, their firm is able to add value to clients as they seek advisement about family legacy needs, succession planning, and passing down assets to the next generation of children and grandchildren.

"We bring individual strengths to the firm," said BJ Brookshire. "Working together and using LPL's tools, our clients have an opportunity to benefit from objective and comprehensive wealth management services that help propel them toward their long-term financial goals."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Brent and BJ to LPL, and are thrilled to be able to support a family business that is building a legacy and providing enduring support to their clients. As the advice industry continues to evolve, we are committed to providing a business model suited to meet their needs, backed by the technology, resources and capabilities that can help them differentiate their business. We look forward to supporting their business for many years to come."

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

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Source: LPL Financial Holdings, Inc.