LPL Financial

LPL Financial and Credent Wealth Management Welcome Brian Davis and Brian Remson

May 30, 2019

CHARLOTTE, N.C., May 30, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisors Brian Davis and Brian Remson have joined LPL Financial, aligning with existing firm Credent Wealth Management. The advisors, both CERTIFIED FINANCIAL PLANNER™ practitioners, will be supported by LPL Financial's broker-dealer and hybrid registered investment advisor (RIA) platforms. Davis and Remson reported having served approximately $110 million of client brokerage and advisory assets* and join from Raymond James Financial Services.

"We found true kindred spirits in Credent Wealth and LPL Financial. It was important to us that our new partners place as much emphasis on integrity and putting clients first as we do," said Remson. Davis and Remson share Credent Wealth's belief in providing independent and affordable advice to all Americans to help each of their clients pursue their financial freedom.

Davis added, "Credent Wealth takes a strategic team-based approach to providing clients personalized investment strategies. With their partnership and access to LPL's tools and resources, we can improve our service model by spending less time on office work and more time deepening relationships with our clients, boosting our ability to serve our clients' financial needs."

Davis and Remson's Waco, Texas-based firm is Credent Wealth Management's seventh location, adding to existing offices in Texas, Indiana and Michigan.

"I am so excited to partner with Brian Davis and Brian Remson," said David Hefty, CEO, Credent Wealth Management. "They are such high-quality people and care deeply about their clients. We are excited about the contributions they will bring to the Credent Wealth family, especially their enthusiasm to focus on clients, which aligns with our mission to improve the client experience in everything we do. We look forward to their partnership and the continued support of LPL to help advance our firm."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We are proud to be a supporting partner to Brian Davis, Brian Remson and the entire Credent Wealth family. We are committed to providing industry-leading tools and an integrated platform that helps advisors work efficiently and deliver a differentiated experience to their clients. We look forward to supporting their business today and into the future, offering a choice of business models and capabilities that can meet them where they are."

More information about Credent Wealth Management can be found on their website CredentWealth.com

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 offered through LPL Financial, Member FINRA / SIPC. Investment Advice offered through CX Institutional, a registered investment advisor. Credent Wealth Management, CX Institutional, and LPL Financial are separate entities.

*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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Media Contact:
Lauren Hoyt-Williams

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

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