



## LPL Financial Welcomes PacNorth Retirement Group

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CHARLOTTE, N.C., July 02, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that the financial advisors of PacNorth Retirement Group have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors reported having managed approximately \$1.1 billion of brokerage, advisory and retirement plan assets\*. They join from Raymond James Financial Services.

PacNorth Retirement Group is the result of combining two financial practices started in the 1970s: RC Roland, Chad Roland, Blair Roland and Gary Douvia of RDH Investments, and Garry Borders, Matt Borders and Joel White of Borders, White, & Tait, LLC.

"With a large retirement plan business serving hundreds of individuals and dozens of companies, we were looking for a partner that could provide the tools and resources to operate more efficiently," said RC Roland. "We were impressed by LPL's capabilities and technology, and how the integrated platform can streamline and improve how we can work with clients."

Along with serving plan sponsors and participants, the firm also provides retirement planning services to individuals. "Transitioning to retirement is a major milestone for all Americans, and it can be overwhelming for clients. We work closely with our clients to design a plan that is tailored to their unique financial goals."

The advisors have more than 200 years of collective experience, and have the support of team members Tina Nelson, Drushelle Warnick, Jeanne Schoney, JoAnn Packer and Mason Adams. They operate in Spokane Valley, Wash., and serve individuals and companies across the Pacific Northwest.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "There is an increasing demand for advice, with investors needing help to plan and save for a successful retirement, and then to have the guidance and support to manage a sustainable financial plan in retirement. The PacNorth team plays an important role to help their clients at each stage of their financial lives. We welcome them to LPL and are committed to investing in the breadth of wealth management resources that help them be successful meeting the needs of their clients."

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.

PacNorth Retirement Group 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 1996-2019

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