LPL Financial Welcomes Patrick Foy and Chris Willis

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CHARLOTTE, N.C., July 16, 2019 (GLOBE NEWSWIRE) -- LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisors Patrick Foy CFP® CIMA® and Chris Willis have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors reported having served approximately $125 million of client brokerage and advisory assets* and join from Raymond James Financial Services.

Foy and Willis have worked together for over 18 years at their Winnie, Texas-based firm. Focused on serving retirees and business owners, the financial advisors provide clients comprehensive wealth management, individualized investment planning and tax services, with the help of office manager Victoria Paniagua.

"We want to help our clients plan for their futures, live the best lifestyle that they can in retirement, and leave a legacy to their families," said Foy, who mentioned they take an approach to managing portfolios with an eye on risk first, return second.

"With the support of LPL, we will have access to resources that can streamline the services we provide and help eliminate loads of paperwork, which will allows us to spend more time developing deeper relationships with our clients," said Willis, who specializes in tax services.

"We put our clients' needs first," Foy added. "LPL's advisor-centered culture aligns with our values, and we believe they provide the best platform to help advisors flourish."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We are invested in our advisors, today and for the long run, and we are proud to be a supporting partner to Patrick and Chris. It is our objective to provide a culture that is centered around the needs of our advisors, empowering them to deliver on the commitment they have made to their clients. We will continue to invest in innovative capabilities that will improve the way our advisors work with their clients to help drive success."

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. Tax and/or accounting services are entirely separate and apart from LPL Financial.
*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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