



## LPL Financial Welcomes Corpus Christi Financial Group

Sep 7, 2021

CHARLOTTE, N.C., Sept. 07, 2021 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that Corpus Christi Financial Group has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. The advisors reported having served approximately \$400 million in advisory, brokerage and retirement plan assets\*. They join LPL from Voya, which was recently acquired by Cetera.

Led by managing partner Cory Summers CFP®, the Corpus Christi, Texas-based team comprises of financial advisors Kurt Emerick CFP®, Jim Mailhes CFP®, Alan Canine CPA, Justin Martinez and Ava "Diane" Smith, as well as two licensed assistants and five office support staff members. "With no minimums or income level requirements, we work with a diverse group of hard-working individuals looking to simplify their complex financial lives," Summers said. "We develop personal relationships with each client, and are focused on financial education to help them understand the 'why' behind the strategies and plans we put in place."

Since Summers purchased Corpus Christi Financial Group in 2013, the practice has grown significantly in size. Their growth trajectory, coupled with the fact that their previous firm was acquired, prompted the team to find a new wealth management partner. "We wanted a place we can call 'home' for the long-term; somewhere we can focus on clients and not worry about the next change," Summers said. "After extensive due diligence, the entire team determined that LPL would be the best partner to help us provide our clients with innovative technology solutions that allows them to aggregate, plan and track all of their financial aspects in one place."

As the business continues to expand, Summers also believes LPL helps put them in the best position to grow and attract new advisors to the team. From Day 1, Summers will tap into the firm's premium buyer program offered by [M&A Solutions](#), as well as the [Assurance Plan](#) to ensure business continuity in the event of an unplanned exit. He stated, "We want to partner with retiring advisors to continue their legacy, and also ensure that our clients receive continuous service and support. Because ultimately, it's all about them."

Scott Posner, LPL executive vice president, Business Development, stated, "We warmly welcome Cory and the entire Corpus Christi team to the LPL family. We are honored they recognized the value of partnering with LPL as they take steps to create differentiated experiences for their clients and establish a long-term plan for their business. We can partner with them in a variety of ways, including making value-add strategies like M&A more efficient and cost effective. We look forward to supporting Corpus Christi Financial Group for many years to come as they work to build a more productive and sustainable practice."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of [LPL.com](#).

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### About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader\*\* in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

*\*\* Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

\*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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/ SIPC

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC. We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

Corpus Christi Financial Group and LPL Financial are separate entities.

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Source: LPL Financial Holdings, Inc.