



LPL Financial Welcomes Integrity Financial Services

Jan 12, 2021

CHARLOTTE, N.C. – Jan. 12, 2021 – [LPL Financial LLC](#), a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that father and son financial advisors John and Evan McCoy of Integrity Financial Services have joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. The team reported having served approximately \$150 million in brokerage, advisory and retirement plan assets*. They join LPL from Securities America, part of the Advisor Group network of broker-dealers.

With more than 30 years industry experience, John McCoy joined Integrity Financial Services in Lancaster, Penn., about 10 years ago with a partner advisor, who retired last year. After graduating from the University of Pittsburgh and gaining industry experience working at an accounting firm, Evan joined his father's business in 2018. His addition to the firm helps ensure they can provide continuous care for multiple generations of clients for years to come. The advisors receive office and client services support from Susan Turman and Kris Martin.

"It's very rewarding to work together and take a team approach to helping our clients establish financial goals, prepare for retirement and work toward meeting their investment objectives," John said. "I trust my son completely, and we've found that we each bring different strengths to our firm."

LPL's ClientWorks and digital capabilities

Looking to enhance their [digital capabilities and service experiences](#), the team chose to move to LPL Financial. "We've found ClientWorks to be smooth and intuitive, and we've already seen a large reduction in forms and paperwork," Evan said. "The time it takes to open an account has been drastically reduced for our team, freeing up more time to focus on our clients. Also, we believe the enhanced back office support we get from LPL will help us build on some of our services as we continue to grow." The team also said they appreciate the advantages of [LPL's self-clearing capabilities](#).

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome John and Evan to the LPL family and are proud to serve as their partner as they grow their business and reach new generations of clients. Independent advisors are looking for quality, and we are able to provide them with enhanced service experiences, robust resources and innovative capabilities designed to help advisors differentiate their practices, build long-term relationships with clients and win in their markets. We look forward to supporting Integrity Financial Services for many years to come."

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](#) is a leader in the retail financial advice market, the nation's largest independent broker-dealer** and a leading custodian (or provider of custodial services) to RIAs. We serve independent financial advisors, professionals 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 1996-2020.

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.

Integrity Financial Services and LPL Financial are separate entities.