LPL Financial Welcomes West Texas WealthCare

Jan 14, 2021

CHARLOTTE, N.C. – Jan. 14, 2021 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisors Cassandra Fillingim CFP®, Elaine McNair CFP®, and Michael Gardiner CFP® of West Texas WealthCare have joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. They are aligned with JFC Financial, a large enterprise that joined LPL in 2020. The West Texas team reported having served approximately $175 million in brokerage, advisory and retirement plan assets*. They join LPL from Avantax Investment Services, part of Blucora.

The three advisors, all Certified Public Accountants, have known each other for more than 20 years. They joined together as a business about 10 years ago and are now supported by a five-member office staff with registered offices in Canadian, Lubbock, Big Spring and San Angelo. The boutique firm offers tax-centric financial advice and wealth management to a client base of mostly ranchers, small businesses and widows working through the estate process.

"We are building out a one-stop shop to take care of all of our clients' financial needs," Fillingim said. "By developing proactive tax-sensitive strategies, we provide custom comprehensive solutions to help empower our clients live their dreams and work toward their financial aspirations."

LPL creates a user-friendly experience for clients

As the team eyes future growth opportunities by adding more advisors and expanding to other locations throughout Texas they chose LPL to support their business. "LPL is a partner with scale, and one that has positive name recognition that we can be proud to associate with," Fillingim said. "We're always looking for ways to improve our client experiences, and we found that LPL creates a user-friendly experience for clients, with their information easily accessible. And they provide access to a comprehensive range of products so we can deliver investment strategies customized for our clients. We're energized by all the portfolio options provided by LPL, with an additional layer of support from JFC Financial."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to Casie, Elaine and Michael and are honored to serve as their partner in this next chapter of their business. We also congratulate JFC on its continued growth. As financial advisors continue to seek new ways to enrich the experience for their clients, we are committed to making investments in differentiated capabilities and solutions designed to help them meet the relevant needs of their markets. We look forward to a long-lasting partnership with West Texas WealthCare and JFC Financial."

Read about other firms that recently joined LPL in the LPL Financial News and Media section of LPL.com.

Advisors, find an LPL business development representative near you.

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.