



LPL Financial Welcomes Financial Advisor Gary Stiles

Jan 19, 2021

CHARLOTTE, N.C. – Jan. 19, 2021 – [LPL Financial LLC](#), a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisor Gary Stiles has joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. He reported having served approximately \$110 million in brokerage, advisory and retirement plan assets*. He joins LPL from Securities America, part of the Advisor Group network of broker-dealers.

Based in Sewell, N.J., Stiles provides holistic financial planning with support from a paraplanner and office assistant. "We specialize in retirement income distribution planning, with an eye toward tax efficiency," Stiles said. "Our business was designed to be a one stop shop where we can offer comprehensive financial advice to our clients and then explain how it will impact various tax scenarios."

Long-term stability at LPL

Stiles said the search for a new firm began last year after his previous broker-dealer was acquired. "It was time to join a new firm that would help ensure my clients' best interests are put first. As a publicly traded company, I believe LPL will provide my business and clients with long-term stability," Stiles said. He also pointed to LPL's vertically integrated platform for "making life much easier," streamlining clearing and custodial services.

"LPL Financial's enhanced technology is another huge draw," Stiles said. "We love that DocuSign is integrated throughout the system to make it easier and quicker for clients to electronically sign important documents. We've also found that LPL's advisor support and transition capabilities have been phenomenal, with timely responses to our service needs."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We believe that focusing on the advisor experience is key to being able to deliver value as their partner. With a deep understanding of our advisors' business, LPL is able to direct investments in meaningful ways. With access to digital capabilities, personalized service and innovative solutions that support business ownership, our advisors are able to evolve the way they operate and deepen their value with clients. We welcome Gary and team to the LPL family and look forward to supporting his business for 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.

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