LPL Financial

LPL Financial Welcomes Washington Crossing Financial Group

Jan 26, 2021

CHARLOTTE, N.C. – Jan. 26, 2021 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisors Brendan Biruk CFP® and Dan Rattigan CFP® have joined LPL to launch their new independent practice, Washington Crossing Financial Group. They will leverage LPL Financial's broker-dealer and corporate RIA platforms, using LPL as custodian. They reported having served approximately $245 million in brokerage, advisory and retirement plan assets*. They join LPL from UBS Financial.

Located in the heart of Washington Crossing, Pa., about a half mile from where George Washington crossed the Delaware River, the new practice represents an exciting next step for the colleagues who have worked together their entire career. "We started in a program at a former company over 20 years ago. We were the only ones left when the program ended, so we decided to partner that day and have taken a team approach since the very beginning," Rattigan said. Leslie Gabell Crilley joined the team as a wealth management associate in 2009.

They offer comprehensive financial planning and personalized wealth management strategies to help clients work toward their financial goals. As fiduciaries, the advisors also provide consultation for corporate retirement plans.

Going independent with LPL Financial

"As we evaluated next steps for our practice, we all agreed it was time to go independent. By partnering with LPL, we have the freedom to run our business our way, with clients' best interests top of mind," Biruk said.

Rattigan added, "We also have access to a wide range of products and platforms that will help us provide even better service and investment strategies tailored for our clients. We appreciate that LPL allows us to choose our own financial planning tools, analytical software and CRM system, all integrated into one platform to make our job easier. We believe that with LPL's partnership, we can do an even better job for our clients."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We are proud to welcome Brendan, Dan and Leslie to LPL and congratulate them on the launch of their new independent practice. We firmly believe that advisors know what is best for their clients and they should have a choice in how they build their practice to serve their clients' unique needs. We are committed to investing in innovative capabilities, robust resources and business management solutions that can help our advisors build, grow and evolve a differentiated practice on their own terms. We look forward to a long-lasting partnership with Washington Crossing Financial Group."

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.