



## LPL Financial Welcomes Financial Advisor Darrell Todd

Feb 8, 2021

**CHARLOTTE, N.C. – Feb. 8, 2021 – [LPL Financial LLC](#)**, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisor Darrell Todd has joined LPL Financial, leveraging its broker-dealer and corporate RIA platforms, including custodial services. He is aligned with JFC Financial, a large enterprise that joined LPL last year. Todd reported having served approximately \$110 million in brokerage, advisory and retirement plan assets\*. He joins LPL from Hilltop Securities.

Todd, who has more than 30 years of industry experience, founded Southlake Financial Services in 2010 in his hometown of Trophy Club, Texas. He is joined by Kinsey Chadick, registered sales assistant. They built the business by listening to clients and providing personalized planning and objective financial guidance to their client base of retirees, business owners and high-net-worth individuals.

“Our mission and commitment to our clients is that we will maintain high standards of integrity and professionalism as we help clients understand their unique financial situations and work with them to pursue their financial goals,” said Todd, a member of the Chartered Financial Analyst Society of Dallas / Fort Worth.

### Why Todd Moved to LPL

After a three-year search, the Southlake team chose to move its business to LPL. “All of our research and due diligence pointed to LPL. We are confident that we have found a partner that will create office efficiencies and enhanced client experiences,” Todd said. “With innovative capabilities, our daily tasks such as trading and managing accounts will be simple and quick, freeing up more time to spend with clients. We also really appreciate LPL’s extensive Research department to help us pass along thoughtful market insights and investment information to our clients.”

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, “We extend a warm welcome to Darrell and Kinsey and are honored they chose LPL as their partner in this next chapter of their business. We also congratulate JFC Financial on growing its network of quality advisors. As financial advisors seek new ways to differentiate the experience for their clients, we are committed to making significant investments in innovative, integrated capabilities that can help them meet the relevant needs of their market. We look forward to a long-lasting partnership with Southlake Financial Services and wish them great success in the 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.

Southlake Financial Services, JFC Financial and LPL Financial are separate entities.