



## LPL Financial and Perennial Financial Services Welcome Advisors Mike Fuller and Rob Barber

Jun 9, 2021

**CHARLOTTE, N.C. – June 9, 2021** – [LPL Financial LLC](#) today announced that financial advisors Mike Fuller and Rob Barber have joined LPL Financial's broker-dealer, hybrid (RIA) and custodial platforms, affiliating with Perennial Financial Services, an existing large enterprise serving LPL-affiliated advisors. Fuller and Barber reported having served approximately \$155 million in advisory, brokerage and retirement plan assets\*. They join LPL from Raymond James.

With more than 25 years of experience helping clients manage their finances and navigate market conditions, Fuller takes a comprehensive approach to investments, risk management and estate planning for his client base of retirees, individuals, families and business owners. He teamed up with Barber, an up-and-coming advisor, in 2019, recognizing they shared like-minded values and a commitment to personal attention and service. They are assisted by Office Manager Lisa Camassa.

### Why Mike and Rob chose LPL Financial

They chose to move their Arroyo Grande, Calif. practice to LPL in hopes of freeing up their time and creating differentiated service experiences for their clients. "Over the years, industry regulations have grown more complex and we've been spending an increasing amount of time on compliance-related issues. We believe this new partnership with LPL and Perennial will alleviate some of the headache and extra work, allowing us to concentrate on addressing our clients' needs. [LPL's innovative technology](#) is user-friendly and will allow us to easily track things, and the simplified account opening process takes just a few minutes," Fuller said, noting that he is also energized by LPL's dedicated service teams and a west coast home office presence. "We're looking forward to being able to spend more time with our clients and show them the new resources that we'll have available to better serve them."

John Petrick, senior managing director at Perennial, stated, "It's an absolute honor to welcome Mike, Rob and Lisa to our expanding network of advisors here at Perennial. The decades of experience and success, coupled with the independent and entrepreneurial spirit that Mike and his team bring to our family of advisors, perfectly align with our core principles and ideals. The Central Coast is such a tight knit community and one of the few remaining areas in the state that maintain that 'small town' feel. Mike's deep roots and years of involvement in and around Pismo Beach, Grover Beach, Arroyo Grande, Oceano and Halcyon personify his dedication and commitment to empowering and bettering the financial situations of his community. We look forward to expanding our presence up the coast and partnering with Mike and his team to continue to develop, streamline and grow his practice together with the support of LPL."

Scott Posner, LPL executive vice president, Business Development, stated, "We welcome Mike, Rob and Lisa to the LPL family and look forward to a long-lasting partnership with the entire team at Perennial Financial Services. LPL is committed to making investments in the differentiated capabilities and robust business resources designed to help advisors meet the evolving needs of their clients and continue to build their business with long-term value in mind. We continue to accelerate the standard in financial services, and find new and innovative ways to help advisors save time. We're honored Mike and team recognized us and chose to join LPL for the next chapter of their business."

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 (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader\*\* in the markets we serve, supporting more than 18,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

*\*\* Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine June 1996-2020); No. 1 provider of third-party brokerage services to banks and credit unions (2019-2021 Kehler Bielan Research & Consulting Annual TPM Report)*

\*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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member [FINRA/SIPC](#).

Perennial Financial Services advisors offer Investment Advice through Perennial Investment Advisors, a registered investment advisor.

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.

Perennial Financial Services, Perennial Investment Advisors and LPL Financial are separate entities.