LPL Financial, Professional Wealth Advisors Welcome Financial Advisor Bryan Schneider

Dec 21, 2020

CHARLOTTE, N.C. – Dec. 21, 2020 – LPL Financial LLC, a leading retail investment advisory firm, independent broker-dealer and registered investment advisor (RIA) custodian, today announced that financial advisor Bryan Schneider has joined LPL Financial's broker-dealer and corporate RIA platforms, leveraging LPL as custodian. He reported having served approximately $425 million in advisory, brokerage and retirement plan assets*. He joins LPL from JP Morgan Securities.

Schneider joins the group of existing advisors at Professional Wealth Advisors (PWA), an LPL wealth management team based in Downers Grove, Ill. He brings over two decades of experience to the team, having launched his career supporting the back office of a trust company and working his way up to his role as a partner wealth advisor managing assets for approximately 400 households*. Schneider prides himself in helping his clients pursue their financial goals through personalized plans and strategies.

Why he chose LPL and Professional Wealth Advisors

He chose to partner with LPL Financial and Professional Wealth Advisors as a way to elevate his practice and provide more comprehensive wealth management. "I wanted to go somewhere where I had more freedom and autonomy. At LPL, I'm able to provide estate and financial planning, as well as asset management, and I have access to a wide range of products and services that can be customized for my clients' needs," Schneider said. "Coming from an established platform, it was important that I receive the support and affiliation of a strong and reputable partner such as LPL. The level of innovative technology has transformed how we open new accounts and how I manage my book of business."

With an additional layer of support from Professional Wealth Advisors, Schneider is able to focus on his clients by having the in-house operations and client service staff to help with most of the business aspects. He also appreciates that he can work side-by-side with other like-minded advisors within the group to share ideas and best practices.

"Our team is growing quickly with experienced, dedicated financial professionals. We are lucky to partner with an advisor of Bryan's caliber and we value his contributions to clients," said Josh Gerry, managing partner at Professional Wealth Advisors. "The goal of our firm is to be a family office for every one of our clients and work to fulfill our promises to each of them. Bryan fits perfectly with our culture and firm goals. On behalf of the entire PWA team and my partners, Steve and Pete, we extend a warm welcome to Bryan."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Bryan to the LPL family and congratulate Professional Wealth Advisors on growing its team. Our one and only focus is to support our advisors, and we do that by helping them create differentiated practices and win in their markets. We will continue to use our size and scale to create value for our advisors, including making investments in the innovative technology and business resources that can help them be more successful by serving their clients efficiently and effectively. We look forward to supporting Bryan and the entire Professional Wealth Advisors team for years to come."

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.

shareholders in the “Investor Relations” or “Press Releases” section of our website.

Professional Wealth Advisors and LPL Financial are separate entities.