LPL Financial

LPL Financial Welcomes Financial Advisor Stacey Williams

Dec 23, 2019

CHARLOTTE, N.C. – Dec. 23, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Stacey Williams has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms, aligning with The Financial Services Network, an existing LPL firm. She reported having served approximately $160 million in brokerage, advisory and retirement plan assets*. She joins from Bank of Hawaii's Bankoh Investment Services.

Williams joins her husband, longtime LPL advisor Rob Williams, at ARA Wealth Management Group in Hilo, Hawaii. With more than 28 years of banking experience and 20 years in the financial services industry, her primary focus is retirement planning. She is eager to begin the next stage of her career as an independent financial advisor.

"It's been a goal and dream to work with my husband, using our individual strengths to grow our business together," Stacey Williams said. "The move was part of a succession plan so that Rob and I can get to know each other's clients. We believe the team approach will help us better serve our clients."

LPL Will Help Better Serve Clients

Williams added, "I'm so excited to partner with LPL and The Financial Services Network. Their innovative technology, resources, services and product access will help enhance the client experience. Already, their transition support has been outstanding."

The mother of five and grandmother of two is passionate about educating youth in financial literacy. In her spare time, Williams volunteers for various organizations and schools. She serves as director for Junior Achievement of Hawai`i Island and is on the advisory board for The Salvation Army Hilo Temple. She's also a board member for E.B. de Silva Elementary School.

"We are honored to welcome Stacey Williams to The Network," said Christopher Mercado, managing partner and chief investment strategist with The Financial Services Network. "We are privileged to be a part of her integration as she joins her husband Rob Williams to enhance an already successful wealth management practice."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Stacey to LPL as she begins the next chapter of her career, and congratulate The Financial Services Network on expanding its network of quality advisors. The independent business model gives advisors the freedom and flexibility to provide personalized financial guidance to their clients. We will continue leveraging our scale to offer the technology, service and other wealth management resources that deliver value and help address the evolving needs of America's investors."

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 and the nation's largest independent broker-dealer**. We serve independent financial advisors 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 personalized 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 1996-2019