LPL Financial Welcomes Hadel Financial Advisors

Dec 11, 2019

CHARLOTTE, N.C. – Dec. 11, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced financial advisors Greg Hadel CFS and Sean Aikmus CFP® have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. They reported having served approximately $165 million in brokerage and advisory assets*. They join from Woodbury Financial Services, part of the Advisor Group network of broker-dealers.

Based in Overland Park, Kan., the uncle-nephew team focuses on wealth management and retirement planning. They're strong advocates of comprehensive financial planning and its many facets—from pension planning to survivor benefits to chronic care. "We've always believed in doing what's right for the client. If a portfolio isn't good enough for my own family and children, we don't offer it to our clients," said Hadel, who founded Hadel Financial Advisors, Inc. in 1981.

Hadel said it is rewarding to work with his nephew. "He's family, but he's also my best friend. We hunt together, we fish together and we work together. We have our own clients and individual relationships, but we also do a lot of joint work. Being able to work side-by-side with a partner financial advisor adds so much value to our business. We can better serve our clients with two sets of ears and two sets of eyes."

The team chose to join LPL seeking integrated technology to enhance office efficiencies and the client experience. "We've found the client onboarding and trading features within LPL's ClientWorks platform to be extremely easy to use. The system is intuitive and provides all the tools we need to run our business effectively." Additionally, Hadel said, LPL's size and scale allows them to do fee-based advisory in a more cost-effective manner.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We are inspired by Greg and Sean's passion to work together, and that drives us to deliver the best for our clients every day. We are committed to investing in integrated capabilities—such as the systems they use to share clients—as well as resources and tools centered or our advisors and the investors they serve. As a partner with scale, we will continue to look for ways to drive down costs and bring value to LPL advisors' businesses. We welcome Greg and Sean to LPL. We think this will be a great relationship and look forward to supporting Hadel Financial Advisors for years to come."

Read about other firms that recently joined LPL in the LPL Financial News and Media section of LPL.com.

Advisors, explore all the opportunities that affiliating with LPL Financial can bring by speaking with a recruiter today.

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 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 1996-2019