LPL Financial

LPL Financial Welcomes Financial Advisor Pat Gilmore

Dec 14, 2019

CHARLOTTE, N.C. – Dec. 4, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Pat Gilmore CFP® has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. He reported having served approximately $125 million in brokerage and advisory assets*. He joins from Sagepoint Financial, part of the Advisor Group network of broker-dealers.

"I'm very excited about joining LPL Financial, especially with the firm's increasing investments in technology. I can tell that LPL is listening to what advisors want and need, and as a result they've built an incredible digital platform that streamlines processes and creates a better experience for our clients," said Gilmore, a past president of New Jersey Financial Planning Association. "I've also been impressed with LPL's operational talent, hands-on support and ongoing communication. I feel like I have all channels supporting the growth and success of my business."

Client-Centered Financial Advice and Investment Management

Gilmore founded Wayne, N.J.-based PGA Financial Group in 1996 to deliver personalized, client-centered financial advice and investment management. "My philosophy is to educate the client first, then implement a financial strategy that we monitor over time," he said, noting that he works with about 200 clients—many who have been with him since the very beginning.

"We welcome Pat to LPL and are proud to support his independent practice," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "We're seeing a flight to quality in the independent space. Advisors are looking for a partner with the stability, the scale and the commitment to their advisors. Our sole focus is to provide our advisors access to the technology, resources and solutions that will help them be successful financial advisors and business owners. We look forward to being a trusted partner to PGA Financial Group 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 a recruiter near you.

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