



## LPL Financial Welcomes Railroad Investment Group

Nov 21, 2019

**CHARLOTTE, N.C. – Nov. 21, 2019** – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisors Blake Henry and Laurel Jackson Callaway of Railroad Investment Group have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. They reported having served approximately \$100 million in brokerage and advisory assets\*. They join from Raymond James.

The wealth management practice, which sits alongside a railroad track in the heart of Opelika, Ala., was created last year when Henry and Callaway merged their businesses. Together, they provide investment advice to mass affluent workers preparing for or already in retirement. "Our focus is investing for income. As clients enter retirement and seek more financial freedom, we're here to provide customized strategies to help replace their job income with income from investments," said Henry, an avid runner who has competed in two Iron Men triathlons and 11 marathons. He said the same work ethic that goes into preparing for races applies to his dedication to serving clients.

Callaway added that she is passionate about helping women navigate financial independence as they work toward meeting their long-term goals. She works closely with many widows, divorcees and female business owners. "I want my clients to envision what they want their lives to look like. It's not only about saving for retirement, but what you want it to look like when you're there," she said.

### Enhanced Platforms & Technology Bring Group to LPL

The duo moved their business to LPL Financial seeking enhanced platforms and technology. "With LPL's ClientWorks digital capabilities, everything is right there. It's simple, easy to navigate and very thorough," Henry said. "The single-sign-on allows us to integrate our data with the tools we use every day, making it easy for us to provide a comprehensive financial picture to clients. We're confident LPL's resources will enhance our ability to serve our clients and grow the business." Callaway noted that she also appreciates how LPL's independent platform gives her freedom as a business owner to set her own hours, ensuring she can be present for the key moments in her 5-year-old son's life.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Blake and Laurel to the LPL family. Everything we do is driven by how we can help our advisors. Our goal is to empower them with the choice and flexibility to run their business the way they want and to provide them with access to value-add technology, tools and resources that can help them provide meaningful, customized services to their clients. We look forward to a long-term partnership with Railroad Investment Group."

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 objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.

Securities and Advisory services offered through LPL Financial, a registered investment advisor. Member FINRA / SIPC.

Railroad Investment Group and LPL Financial are separate entities.

\*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