



LPL Financial Welcomes Financial Solutions Group

Oct 7, 2019

CHARLOTTE, N.C. – Oct. 7, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that 10 financial advisors with Financial Solutions Group have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The large enterprise reported having served approximately \$1 billion in brokerage and advisory assets*. They were formerly associated with FSC Securities Corp.

Based in Alexandria, La., with a second office in Lake Charles, La., Financial Solutions Group is a client-driven practice with roots dating back to 1978, when advisor Greg O'Quin entered the industry as a CPA. Over the years, the business shifted focus to investment advice, wealth management and financial planning. The practice has grown to include nine additional financial advisors, including his sons Patrick O'Quin and Philip O'Quin, as well as James Curley, Thomas Easterling Jr., Brooks Harris, Bart Schmolke, Brian Schmolke, Christopher Soprano and Michael Young. They have additional support from an office manager and seven administrative assistants, including three who are registered.

The advisors have individual practices, but they take a collaborative, service-oriented approach when helping their clients—mostly retirees and pre-retirees—make more informed financial decisions. "We're focused on delivering value and building meaningful relationships with our clients, providing exceptional service and smart growth in a compliant manner along the way," Young said.

The group turned to LPL Financial seeking integrated technology to enhance the client experience and improve efficiency. "We appreciate that the technology is all connected within ClientWorks. We can move easily from eSignature to opening a new account, with the ability to open multiple accounts at once, all within one platform," said Young, who also noted LPL's service transformation and commitment to making it easier for advisors to do business as other key reasons for the move. "Between the size of the organization and the expertise of the skilled team members at LPL, we are confident that our business will thrive with this new partnership."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to Financial Solutions Group. Independent advisors are looking for quality, and we are able to provide them with innovative technology, robust resources, capital to help them grow and a stable firm committed to supporting advisors. We look forward to being the team's partner for years to come as they continue to grow their practice."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of LPL.com.

Advisors, learn how to take a [proactive approach in the progression](#) and future planning of your firm.

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.

Financial Solutions 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