LPL Financial Welcomes Father / Daughter Financial Advisors Emile and Anne Oestriecher

Jun 17, 2020

CHARLOTTE, N.C. – June 17, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that father and daughter financial advisors Emile P. Oestriecher III CPA and Anne Oestriecher CPA, CFP® have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. They reported having served approximately $100 million in brokerage and advisory assets*. They join from Avantax Investment Services, part of Blucora.

Emile, who launched an accounting practice in 1970 in his hometown of Alexandria, La., formed Oestriecher Financial Management Services in 1999 to expand the services offered to clients. With a background in accounting, Anne joined the family business in 2010 as full partner. The team also includes a licensed assistant and two junior financial professionals studying to become advisors; all are part of a business continuity plan to help ensure clients are served for generations to come.

The entire practice shares a single office, allowing clients the opportunity to receive both wealth management advice and tax advice in one visit. "Our niche is that we have a very deep understanding in taxes and the ability to really dive into a client's total financial situation," said Anne, who said she learned both sides of the business from her father, who she said is her role model and mentor.

Both Anne and Emile are highly active in their community. As Scoutmaster of Boy Scouts of America Troop 6 since 1972, Emile has trained over 170 Eagle Scouts and helped hundreds of other young men develop values and leadership skills. Known as "Mr. O." to his Scouts, he has been recognized many times for this commitment. Anne has been a volunteer with the Cystic Fibrosis Foundation for more than 30 years, serving as chairwoman for the Great Strides Walk each year, as well as helping with other foundation projects. She also serves on the Boy Scouts Troop committee. Both father and daughter are active in their church and other community organizations as well.

Why They Chose LPL Financial

Looking for more freedom to do what they believe is best for their clients, the Oestreichers chose to move their financial advice business to LPL Financial. "First and foremost, LPL does not offer proprietary investment products, which was very important to us because it means there is no pressure to sell certain products. We love that independence to find the best solutions for our clients. We also appreciate the service and support LPL provides," Anne said. "And we are incredibly excited about LPL's technology platform, which we believe will save us time and create a better client experience."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We extend a warm welcome to Emile, Anne and the team. We applaud the commitment they have shown to their clients and community, and we admire their foresight to build their firm today in such a way to help ensure their clients are taken care of for generations to come. We share that commitment of being a partner for the long run. Our advisors are our focus, and we dedicate capital to be able to invest in the capabilities, technology, service and practice management resources that help our clients differentiate their firms today and as their clients' and their business' needs evolve. We look forward to a long-lasting partnership with Oestriecher Financial Management Services."

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

Advisors, find an LPL business development representative 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, professionals, 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.

Tax related services offered through Oestriecher & Company CPA Inc. Oestriecher Financial Management and Oestriecher & Company CPA Inc. are separate entities from LPL Financial. LPL Financial does not offer tax advice or tax related services.

*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

Throughout this communication, the terms “financial advisors” and “advisors” include registered representatives and/or investment adviser representatives affiliated with LPL Financial LLC, an SEC registered broker-dealer and investment adviser.