LPL Financial

LPL Welcomes Intermountain Financial Partners

Aug 29, 2019

CHARLOTTE, N.C. – Aug. 29, 2019 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisors Brian Kasteler, Joseph Taylor, Nathan Woodward, Jorge Becerra, Michael Donaldson and Patrick Latimer of Intermountain Financial Partners, have joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The firm reported its advisors served approximately $700 million of client brokerage, advisory and retirement plan assets*. They join from MML Investors Services.

"Our goal is to provide objective wealth management that addresses the unique needs of each client, using practical solutions related to their holistic financial plan," Kasteler said about Intermountain Financial Partners. "As advisors, we have a like-minded approach when working with our clients. Even though we have separate practices, we often rely on each other for input in our specific areas of expertise."

Taylor and Woodward's mentor, James Woodward, a financial professional with a career that spans over 45 years, founded the Salt Lake City-based firm that serves high-net-worth professionals, retirees, business owners, qualified retirement plans and entrepreneurs. This breadth of service relies on the administrative support from Jenna Rosa, Erica Spencer, Colton Kasteler, Haley Glenn and Lisa Becerra.

"We believe that LPL is the best firm to elevate our wealth management services and capabilities. With their partnership, we have the freedom and flexibility to manage our clients in a way that helps them work toward their financial goals," said Kasteler. "And LPL's culture of treating advisors as a valued client is a philosophy that addresses our needs, allowing us to better serve our clients."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome the Intermountain Financial Partners team to LPL, and look forward to being their partner as they build and grow their practice. Our prime focus is to put advisors at the center of everything we do. We are committed to providing the necessary tools, business solutions, capital and resources they need to serve their clients and build value to their firm. And it's all attainable in an independent platform that gives advisors the freedom to do it their way."

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

Advisors click here 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.

Intermountain Financial Partners 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