



LPL Financial Welcomes Susquehanna Financial Advisors

Feb 12, 2020

CHARLOTTE, N.C. – Feb. 12, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Ed Gormley CFP® CPA has returned to LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. He reported having served approximately \$140 million in brokerage, advisory and retirement plan assets*. He joins from Securities Service Network.

Gormley founded Susquehanna Financial Advisors in 1994 after beginning his career with international accounting firms where he specialized in executive financial planning and taxes. As he grew his team and business, Gormley took on a mentorship role to help guide the careers of Melissa Puija, financial consultant, and Craig Foer, senior tax specialist, who are both actively working to become licensed advisors. The Mechanicsburg, Penn.-based team also includes Laurie Andrus, client relations specialist.

"I'm developing a legacy staff that will continue to deliver asset management, high level services and strategic financial planning for our clients for generations to come," Gormley said, noting his practice currently serves about 250 families, mostly high-net-worth retirees.

Excited to Return to LPL Financial

Gormley was affiliated with LPL at the start of his independent career and said he is excited to return to LPL. "We want to control our destiny as a firm and continue to offer high quality, personalized services. We believe LPL is in a good position to thrive in the industry consolidation," Gormley said. "Also, LPL's level of [innovative technology](#) and advanced estate planning capabilities will complement and enhance our work supporting high-net-worth clients."

Gormley said his long-term goals for the business include potential mergers or acquisitions, and LPL's network of more than 16,000 advisors across the nation offers a pipeline of opportunities. He plans to leverage LPL's M&A resources and succession planning expertise to support him on his path.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "We welcome Ed back to LPL and are proud that he recognized our commitment to supporting advisors through investments in technology, resources and business solutions designed to help them build a productive and sustainable practice. As advisors establish a long-term plan for their business, we can partner in a variety of ways, including making value-add strategies like M&A more efficient and cost effective. We can also provide access to capital without compromising control of their business. We look forward to a partnership with Susquehanna Financial Advisors 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 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 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.

Susquehanna Financial Advisors and LPL Financial are separate entities. Tax related services offered by Foer. 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