Seven Advisors Join Growing LPL Financial Firm Genesis Wealth Management

Sep 11, 2018

CHARLOTTE, N.C. – Sept. 11, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that seven advisors have joined LPL, aligning with Genesis Wealth Management, an independent firm on LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. The advisors include Robert Harlan, John Lander, Heidi Malone, Youree McBride, Richard Poligala, Geraldo Reyes and Max Rodriguez.

Jereme Brisco founded the San Antonio-based firm in July 2016 when moving to LPL from USAA. The practice has grown to 12 advisors, with the new advisors joining managing partners Michael Dubensky and Jon Thompson and advisors Mark Stawarz and Rusty Whittaker. The firm provides wealth management services with a focus on high-net-worth clients.

"Since Genesis was formed in 2016, LPL has continuously proven to be the right partner for us," said Jon Thompson, managing partner at Genesis Wealth Management. "As the firm has made innovative improvements, it has helped our business grow. We are excited to welcome former colleagues who share an appreciation for LPL's commitment to the wealth management space, its independent model and the enhanced resources that enable us to deliver personalized service and customized solutions to our clients."

"On behalf of LPL, I congratulate Genesis Wealth Management and welcome their new advisors to the LPL family," said Craig Kamis, LPL executive vice president, Business Development. "We're proud their firm has chosen us as their growth partner. We look forward to supporting their continued growth."

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.

*Based on total revenues, *Financial Planning* magazine June 1996-2018