



LPL Financial Welcomes Financial Advisor William Matesich Sr.

Jan 23, 2020

CHARLOTTE, N.C. – Jan. 23, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor William “Bill” Matesich Sr. has joined LPL Financial’s broker-dealer and corporate registered investment advisor (RIA) platforms. He reported having served approximately \$140 million in brokerage and retirement plan assets*. He joins from Wells Fargo Advisors Financial Network.

Matesich can pinpoint exactly when he decided to venture into the wealth management industry. It was 1987—the worst year of his life. He lost two grandparents, two uncles, an aunt, and his wife died 35 hours after giving birth to their second child. Six months later, the company he was working for went bankrupt and he lost his job. He moved back in with his parents and reevaluated his life goals. “I didn’t have any experience as a financial advisor, but I love people and I really enjoy finance and it seemed like a natural fit,” Matesich said.

So he took a job at a local bank, earned his licenses and eventually worked for a larger firm where he gained more experience with stocks. In 2009, he launched Matesich Financial Services in his hometown of Grove City, Penn., building an independent business through seminars, charitable work and lots of face-to-face meetings. “In 1987, I had to walk through the fire, but now my life is pretty wonderful,” he said. “The goals and dreams that I set for myself in 1987 came true when I was able to run my own financial services company. It is so rewarding and humbling to watch my clients’ lives play out every day; watching their children succeed and helping them work toward their retirement goals.”

Culture, Quality and Support

He is excited about the next chapter of his life with a new affiliation with LPL Financial. “I am so impressed with LPL’s culture and the quality of employees. I was looking for a company that values honor and integrity and that’s exactly what I found in LPL,” Matesich said. “I also really appreciate that LPL is a committed partner. They offer tremendous support in the background, but I can have my own brand and run my business the way that works best for me and my clients.”

Matesich said he was drawn to LPL’s innovative technology, especially the client-facing systems that allow his customers to track their accounts online, upload legal documents and sign forms electronically. He’s also eager to learn more about social media possibilities from LPL’s marketing team.

“We welcome Bill to the LPL family and are proud to serve the independent practice he built from the ground up,” said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. “His story is so inspiring. We are proud to be able to provide him with value-add capabilities and technology so that he can deepen the legacy he built through his business by helping his clients build and protect theirs. We look forward to supporting Matesich Financial Services 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.

Matesich Financial Services 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