LPL Financial

LPL Financial Welcomes Financial Advisor Brian Sheehy

Jan 21, 2020

CHARLOTTE, N.C. – Jan. 21, 2020 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Brian Sheehy has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. He reported having served approximately $130 million in brokerage, advisory and retirement plan assets assets*. He joins from World Equity Group.

Sheehy launched his independent practice in 2001 and later founded Pinnacle Wealth Management in Chicago, with a branch in Woodland Hills, Calif. He built his practice by teaching educational retirement seminars around the Chicago area, offering free consultations to those who complete the two-night class. "I love interacting with people, helping them create financial goals and becoming more comfortable with investment opportunities," Sheehy said. "It's so rewarding to know my work really makes a difference in their lives."

LPL' s Support and Innovative Technology

Looking for enhanced support and innovative technology, Sheehy chose to move his business to LPL Financial. "It was time to catch up with technology and do more business electronically. I was still using paper for everything, so this move to LPL is going to really help me get my life back," he said. "I love that forms automatically populate in ClientWorks, and I'm especially excited about how clients can visually track their portfolio in Account View. There's no doubt that LPL technology is going to bring so much more to my client interactions." Sheehy added that LPL's self-clearing capabilities will reduce costs and save time.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Brian to LPL and are proud to support his independent practice. His focus on education has helped him build meaningful client relationships and a successful business. As he seeks to modernize his practice, we are a committed partner, providing powerful capabilities, innovative technology and business solutions to help increase efficiency and create an even better client experience. We look forward to a long-lasting partnership with Pinnacle Wealth Management."

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.

*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