LPL Financial Welcomes Multop Financial

Sep 17, 2018

CHARLOTTE, N.C. – Sept. 17, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Multop Financial has joined LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. Multop Financial reported that it served approximately $300 million of client brokerage and advisory assets as of Aug. 24, 2018*.

The Bellingham, Wash.,-based firm was founded in 1976 by Air Force veteran Phillip Multop. Today, the firm includes three financial advisors, three Certified Public Accountants and a six-member support staff. Multop Financial offers wealth management, income tax planning and small business accounting and consulting services. The firm, which joins LPL from Cetera, believes integrating tax planning strategies with comprehensive wealth management advice provides a complete and thorough financial plan for families and business owners, according to Multop.

"The decision to move to LPL was guided by our commitment to our clients," said Multop. "In today's environment, partnering with a steadfast and proven leader such as LPL enables us to support our clients over the long term. In addition, our firm's philosophy directly echoes that of LPL. We are 100 percent committed to our clients' growth, passionate about their success and are exceedingly proud to be their partner."

Multop said LPL's technology and back office support are among the factors that supported their decision to move, providing their advisors more time to work directly with clients. Additionally, he said younger advisors and professionals on his team will gain valuable insight into the industry through LPL's expansive network of like-minded colleagues.

"It's a pleasure to welcome Multop Financial to LPL," said Craig Kamis, LPL executive vice president, Business Development. "Just as they are focused on their clients first and foremost, so are we. We are committed to nurturing a long-term relationship with the Multop Financial team by delivering value to their firm through technology, innovation and expertise that can help their business thrive. We are proud to have the opportunity to support their business."

Find other firms who recently joined LPL Financial at LPL.com.

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. LPL.com

Securities and Advisory Services offered through LPL Financial. A registered investment advisor, Member FINRA/SIPC.

Multop Financial is not an affiliate of LPL Financial, and offers tax services separate from and apart from LPL Financial.

LPL Financial solely provides investment-related services and in no way provides, services, supports or endorses any accounting or tax-related services provided by any CPAs associated with Multop Financial.

*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets have not been independently and fully verified by LPL Financial.

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