LPL Financial Welcomes Infinity Financial Partners

Nov 6, 2018

CHARLOTTE, N.C. – Nov. 6, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Infinity Financial Partners, LLC has joined LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. Infinity Financial Partners reported that its advisors served approximately $365 million of client brokerage and advisory assets*. The advisors join LPL from Cetera.

Based in Richmond, Va., Infinity Financial Partners was founded in 2000 by Ronnie Poindexter and Philip Heesen Jr. Other financial advisors aligned with Infinity include Alex Robinson, Robert Kellis Jr., Dustin Newton, Robert Wheatley, Tyler Dove and Ben Dychala. The advisors provide wealth management services to individuals and business owners, with a client base that spans generations, Poindexter said. The service-minded practice offers primarily fee-based services and places an emphasis on managing risk for clients through market uncertainties.

Infinity Financial Partners chose LPL for its technology and advisory platforms. Poindexter said, "LPL has a range of platforms to serve varying needs, from its digital advice platform to Manager Select. We appreciate that LPL has made significant investments in its infrastructure that will help us deliver more value to our clients. LPL's self-clearing capabilities were another big draw for us. This helps to streamline processes and makes it much easier and more efficient to do business."

"We are proud to welcome Infinity Financial Partners to LPL," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "We continue to invest in our technology and investment platforms to help advisors grow their business, and we are excited that Infinity Financial Partners recognized the value of these investments. We look forward to supporting their firm for many years to come."

For more information about the Infinity Financial Partners, visit www.infinityfinancialpartners.com.

Read about other firms that recently joined LPL Financial in the News and Media section.

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.

*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

LPL Financial and Infinity Financial Partners are separate entities.