LPL Financial

Alia Wealth Partners Joins LPL Strategic Wealth Services

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CHARLOTTE, N.C., Oct. 06, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that Lindsey D. Rhea CFP® of Alia Wealth Partners has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms, affiliating with LPL's Strategic Wealth Services (LPL Strategic Wealth Services) model. She reported having served approximately $260 million in advisory, brokerage and retirement plan assets*. She joins LPL from Wells Fargo Advisors Financial Network.

Based in Germantown, Tenn., Rhea, 36, is an established, next-generation advisor who launched her own practice in 2018. As Owner and Wealth Strategist of Alia Wealth Partners, Rhea works closely with her clients to formulate investment strategies and selections designed to match each individual's specific goals and objectives. Her success has led to numerous industry awards, including 2020 and 2021 *Forbes* Top Women Wealth Advisor, 2019-2021 *Forbes* Best-In-State Wealth Advisor and 2019 *Forbes* Next-Gen Best-In-State Wealth Advisor. She is joined at Alia by Director of Client Services, Leslie M. Parker and Director of First Impressions, Jennifer K. Locke.

Looking to elevate her clients' experiences and plans for future growth, Rhea chose to partner with LPL's Strategic Wealth Services offering. "We went through an extensive due diligence process and LPL really stood out for the depth of resources offered," Rhea said. "LPL is a well-oiled machine and checked the boxes for all the solutions I was looking for. My top priority was the ability to enhance the client experience by providing them with innovative new tools they can use to easily access their account information."

With the additional layer of support from LPL Strategic Wealth Services, Rhea believes she and her team will also have enhanced experiences. All LPL Strategic Wealth Services advisors have access to LPL's integrated wealth management platform and innovative resources designed to help them thrive. In addition, they receive ongoing, personalized support for daily operations and long-term business management, including a dedicated business strategist, CFO, and marketing, service and administrative support. "LPL's Strategic Wealth Servicesteam is an extended part of my practice so that we don't have to do everything on our own," Rhea said. "It is refreshing to have dedicated support from LPL Strategic Wealth Services team members with different skillsets, who are experts in their field, taking some of the things off my plate so I can focus on my clients."

Rhea made the move to LPL with plans for long-term growth in order to support clients for generations to come. She said, "What we're doing here is setting the stage for the future of this business. I want to expand our office, and this transition is a way for me to step back, make sure I'm partnered with the right affiliate, meet new advisors and really build out the Alia brand."

Outside of work, Rhea is deeply involved in her community. She is board chairman for Memphis Oral School for the Deaf, as well as an active member of the Leadership Germantown Board, the Memphis Chapter of National Association of Women Business Owners, and the Germantown Area Chamber of Commerce, among others. She also volunteers on the Advisory Board for the University of Memphis Sigma Kappa Sorority Chapter.

Scott Posner, LPL executive vice president, Business Development, stated, "We warmly welcome Lindsey and her team to the LPL community, and are honored they turned to us as they thoughtfully prepare for the next chapter in their business. We are committed to providing advisors with ultimate flexibility and personalized modern solutions as they build their perfect practice. For our LPL Strategic Wealth Services advisors, we've taken expertise across several complex areas to provide them with a dedicated support team to help them elevate the client experience, differentiate their business and accelerate the success of their practice. We look forward to a long-lasting, productive and exciting partnership with Alia Wealth Partners."

Learn more about Alia Wealth Partners.

Advisors, find an LPL business development representative near you.

About LPL Financial
LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader** in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to objective guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

*** Top RIA custodian (Cerulli Associates, 2019 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehrer Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

*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.

Securities and advisory services offered through LPL Financial LLC, an SEC- registered broker-dealer and investment advisor. Member FINRA/ SIPC

Throughout this communication, the terms “financial advisors” and “advisors” are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial LLC. We routinely disclose information that may be important to shareholders in the “Investor Relations” or “Press Releases” section of our website.

Alia Wealth Partners and LPL Financial are separate entities.

The Forbes ranking of America’s Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews.

The Forbes ranking of Top Next-Generation Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors born in or after 1980. Advisors are interviewed by telephone and in person to evaluate service models, investing process, experience levels and integrity. Additional factors considered include compliance record, client retention, revenues produced for their firms and assets managed.

The Forbes Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms.

In all three rankings, portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK Research receives a fee in exchange for rankings.

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