



## LPL Financial Welcomes Financial Advisor Corinne Koehler

Jun 24, 2020

**CHARLOTTE, N.C. – June 24, 2020** – LPL Financial LLC, a leading retail investment advisory firm, RIA custodian and independent broker-dealer, today announced that financial advisor Corinne Koehler CFP® has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. She reported having served approximately \$120 million in brokerage and advisory assets\*. She joins from Wells Fargo Financial Advisors Network.

The youngest of nine children, Koehler was raised on a dairy farm and early on she set her sights on a career in wealth management. She joined the industry in 1982 and in 2008 launched her independent practice, Koehler Wealth Management. With support from office manager Bonnie Zupancic, they serve families and individuals in the Pueblo, Colo. community, along with clients across the region and in many other states. "I love working with people to help them navigate the steps toward building a more secure financial future. We really focus on financial education and helping our clients understand the complex industry," Koehler said.

As current president of the Pueblo Conservancy District and a founding board member of Historic Pueblo, Inc., Koehler is heavily invested in her community. "Since I make my living in Pueblo, it's important for me to be involved and give back in hopes of making it a better place for generations to come," Koehler said. She has also served on the Pueblo City Council, the Pueblo Zoo board, Greater Pueblo Chamber of Commerce, Junior League of Pueblo, among other organizations.

### Why Koehler made the move to LPL

Seeking more autonomy, Koehler chose to move her business to LPL Financial. "I believe LPL provides the innovative technology, products and services that enable me to deliver advice that is the best fit for my clients," Koehler said. She added that LPL's size and a scale are an advantage as well, with ongoing investments in relevant resources to help her run her practice, and [LPL's fee structure](#) will allow her to pass along savings to her clients.

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "We welcome Corinne to LPL, and we are proud to support her independent practice. She is a tremendous example of how the independent model gives women entrepreneurs and advisors the opportunity to build a successful business on equal terms, with no glass ceiling, no pay gaps and the flexibility to do it her way. We are inspired by her success, created through her commitment to earning the trust and hearts of her clients and her community. We appreciate that she values our size and scale. It gives us the ability to invest in her and her business and help her create value with her clients. But no matter our size, we never lose focus on the individuals we support. We are excited to be Corinne's partner and look forward to supporting the contributions she will continue to make personally and professionally."

Read about other firms that recently joined LPL in the [LPL Financial News and Media section](#) of LPL.com.

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### **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, professionals, 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.

Koehler Wealth Management 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