LPL Financial

# LPL Financial Welcomes Brennan Asset Management Group

Oct 24, 2018

**CHARLOTTE, N.C. – Oct. 24, 2018 –** LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Brennan Asset Management Group has joined LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. Brennan Asset Management Group reported that its advisors served approximately $300 million of client brokerage, advisory and retirement plan assets as of Sept. 6, 2018*. The firm joins LPL from Cetera.

Senior partner Bob Brennan founded the Redding, Calif.,-based business in 1986 after spending four years touring as a professional tennis player. The firm has grown to four advisors: Brennan, Christian Rizzi, Mike Ferrier and Bart Farrell, who provide a complete range of financial services with a focus on retirement plans and asset management for wealthy individuals. They take a client-centered approach and follow a disciplined analysis to identify financial programs and strategic options for each client.

"We believe LPL provides the stability and partnership that will best serve our team and our clients today and for the long run," Brennan said. "LPL's technology creates more efficiency in our practice. Also, the depth of resources and expertise they offer across the range of wealth management services, including support in specialized areas like high-net-worth investment management and retirement plan tools and resources, will help us to deepen the value we bring to our clients."

"On behalf of the firm, I extend a warm welcome to the Brennan Asset Management Group team," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "As our industry evolves, we are committed to leading change through innovation and by investing in the resources, tools and support that can enable advisors to take advantage of market opportunities. We are proud to be able to be a partner to their team for continued growth."

For more information about Brennan Asset Management Group, visit their website.

Read about other firms that recently joined LPL 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; 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 Brennan Asset Management Group are separate entities.