Seven LPL Financial Advisors Recognized by Forbes as Top Next-Gen Advisors

October 7, 2021

CHARLOTTE, N.C., Oct. 07, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC congratulates the seven LPL-affiliated financial advisors named to the 2021 *Forbes* Top Next-Gen Wealth Advisors list.

- Patrick Deeg, Marks Group Wealth Management, Minnetonka, Minn.
- Alex Lewis, Blackbridge Financial, Irmo, S.C.
- Craig Macomber, Stratos Wealth Partners, Irvine, Calif.
- Jason Priebe, Priebe Wealth, Maple Grove, Minn.
- Matthew Riesenweber, Cornerstone Wealth Strategies, Kennewick, Wash.
- Eugene Songy, South Louisiana Financial Services, LLC, Cut Off, La.
- Marc Specht, PM Wealth Management, New York, N.Y.

“On behalf of LPL, I congratulate this group of advisors for their commitment to supporting the comprehensive needs of their clients,” said Angela Xavier, LPL executive vice president, Independent Advisor Services. “We are proud to partner with such talented individuals representing the next generation leading our industry forward.”

Selected from nearly 4,000 nominations, advisors recognized in the *Forbes* Next-Gen Wealth Advisors list were selected based on insights from SHOOK Research, gained through an algorithm of qualitative criterion and quantitative data. Qualified advisors must be under 40 and have a minimum of four years’ experience, and they were judged on criteria such as service model, industry experience, revenue trends, client retention and assets under management*.

See the complete list of *Forbes* 2021 Top Next-Gen Wealth Advisors.

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.

*The *Forbes* Next-Gen Wealth Advisors rankings, developed by SHOOK Research, are based on an algorithm of qualitative criterion, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings.

***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 June 1996-2020); 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*

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