LPL Financial

LPL Financial Welcomes Guy Rodgers Private Wealth Strategies

October 13, 2021

CHARLOTTE, N.C., Oct. 13, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Guy Rodgers has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. He reported having served approximately $175 million in advisory and brokerage assets*. He joins LPL from Wells Fargo Financial Advisors Network.

After starting his career as a family lawyer, Rodgers recognized the need for more ethical financial advisors to help people through times of transition, including divorce, injuries or death. He shifted to his new career as an advisor in 2008, launching a practice focused on providing advanced strategies and financial planning to guide clients through transition. Based in Mansfield, Texas, Guy Rodgers Private Wealth Strategies also has a three member support team, including his wife, Gina, who serves as the firm's office manager, as well as his assistant Aida Chianappi, who spent 20 years as a paralegal for successful family lawyers in Texas and now provides a high-level of service to the firm's clients.

"The last couple of years have been trying on everyone, whether they're planning to retire, lost a job or suffered the death of a loved one," Rodgers said. "In the wake of an ongoing pandemic, it's more important now than ever before to have a knowledgeable and ethical financial advisor to help prepare for the unexpected life events."

Looking to elevate his practice, provide enhanced service in times of crisis and operate in his clients' best interest, Rodgers chose to move his business to LPL. He stated, "LPL provides a wide breadth and depth of planning and investment choices, and most importantly, allows me to create differentiated service experiences for my clients. Our slogan is 'clarity, confidence and concierge care,' and I believe LPL gives me the best option to provide all those services to my clients."

Scott Posner, LPL executive vice president, Business Development, stated, "We welcome Guy and his team into the LPL community and are committed to being their long-term partner for years to come. We will continue leveraging our scale to make ongoing investments in innovative technology, best-in-class service experiences and other wealth management resources that deliver value and help address the evolving needs of Guy Rodgers Private Wealth Strategies and all of our other clients."

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

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.

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Source: LPL Financial Holdings, Inc.