LPL Financial

LPL Financial, The Network Welcome Clearview Wealth Partners

November 23, 2021

CHARLOTTE, N.C., Nov. 23, 2021 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the newly rebranded Clearview Wealth Partners has joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms. They are aligned with The Financial Services Network, an existing LPL large enterprise. The Clearview team reported having served approximately $500 million in advisory, brokerage and retirement plan assets*. They join from Lincoln Financial Advisors.

Clearview Wealth Partners is a full-service wealth management firm that primarily serves business owners, corporate executives and professional athletes. The team is led by managing partners and cofounders Bill Roland ChFC, CLU, and Jim Westermeyer, who are joined by fellow financial advisors Ashley Sawyer and Mike Lemas and a four member office support staff. They operate out of three offices based in Petaluma and Pleasanton, Calif., and Scottsdale, Ariz.

The team's fiduciary responsibility and commitment to providing differentiated client service led them to find new partners in LPL and The Network. "We are excited to move to a fully independent platform with LPL's robust digital technology, combined with The Network's local support and additional resources. We believe our clients will benefit from an enhanced experience right out of the gate with a single portal to access account information, along with full transparency," Roland said.

Westermeyer added, "We are excited to launch our new name and brand, with the Clearview name denoting transparency. This move ensures our clients will have innovative tools and resources available to them. We look forward to growing our practice and helping clients make good decisions around their financial health, investment management, estate planning, overall risk management, business continuity planning, employee benefits and corporate retirement plans."

Christopher Mercado, managing partner and chief investment strategist with The Financial Services Network, stated, "As the needs of more sophisticated wealth management firms increase, The Network's business model continues to attract premier offices across the country. We are delighted to welcome Jim, Bill and the extended team at Clearview Wealth Partners, as we look forward to working together to elevate their client experience through our collective partnership with LPL Financial."

Scott Posner, LPL executive vice president, Business Development, stated, "We welcome Jim, Bill, Ashley and Mike to LPL, and congratulate The Network for growing its community of quality advisors. We are honored that the Clearview team recognized LPL's stability to serve as a long-term partner for their firm and clients. We remain committed to investing in our advisors' businesses to deliver differentiated capabilities, integrated technology and innovative solutions designed to help them thrive. We look forward to a long-lasting relationship with Clearview 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 personalized 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, 2020 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.

Clearview Wealth Partners, The Financial Services Network and LPL Financial are separate entities.

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