LPL Financial

Walker Covey Wealth Advisors Launches With Support of LPL Strategic Wealth Services

Jan 24, 2022

CHARLOTTE, N.C., Jan. 24, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) today announced that financial advisors Andy Walker and Christian Covey have launched a new practice, Walker Covey Wealth Advisors, through affiliation with LPL Strategic Wealth Services model. Previously, the advisors were part of a firm working with approximately $350 million in advisory, brokerage and retirement plan assets.* They join LPL from Commonwealth.

Based in Utah County, Walker and Covey are Brigham Young University graduates who teamed up to combine their strengths in order to help clients better understand their finances and investments. “Working together, we’ve built a strong trust in each other. We’re both grounded in our philosophy and systematic processes focused on principle-based investing,” said Walker, managing partner and chief executive officer.

Walker and Covey are joined by Rebecca McEntire, who will act as the new firm’s Director of Client Services. “We are building a firm based on trust –trust with each other and trust with our clients. We’re committed to continuous education, expanding our expertise and working tirelessly to do what’s in the best interest for our clients,” said Covey, managing partner and chief investment officer.

Video: Meet Andy Walker and Christian Covey

Their client-centric mindset led the advisors to LPL Financial, where they plan to grow their practice and provide clients with differentiated experiences. Walker and Covey appreciate LPL’s integrated wealth management platform and robust resources designed to help advisors run a thriving practice. Additionally, LPL’s mission to take care of its advisors so they can take care of their clients resonated with the Walker Covey team. But it was the additional layer of support provided by the LPL Strategic Wealth Services model that cemented their decision to move.

Personalized support from LPL Strategic Wealth Services
LPL Strategic Wealth Services delivers personalized support for daily operations and long-term business management. Teams are provided with award-winning*** transition support right from the start, as well as ongoing strategic, administrative, marketing and CFO support that allows advisors to stay focused on the enduring needs of their clients, culture and evolution of their practice. “LPL Strategic Wealth Services fills in the gaps so we don’t need to worry as much about things like HR or maintaining our website. We are still running a business, but this model helps us focus on what we do best,” Covey said.

Walker stated, “We are excited to build a practice where we can provide our clients with high-touch service to help relieve some of their financial worries.”

Scott Posner, LPL executive vice president, Business Development, said, “We congratulate Andy and Christian on the launch of their new firm and are honored they turned to LPL to help them build their practice. We understand that advisors want the freedom and flexibility to provide differentiated experiences as they deliver personalized financial guidance. We share that sentiment, and will continue leveraging our scale to offer innovative capabilities and robust wealth management resources that deliver value and address the relevant needs of their clients. We warmly welcome Walker Covey into the LPL community and look forward to supporting their success for years to come.”

Learn more at WalkerCovey.com. Follow the team on LinkedIn, Facebook, or Twitter

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.

** Value approximated based on asset and holding details provided to LPL from the year 2021*

*** 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 Company as of June 2021*

**** 2021 WealthManagment.com Award Winner, Custodian- Transition Support*

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.

Walker Covey Wealth Advisors and LPL Financial are separate entities.

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Lauren Hoyt-Williams
(980) 321-1232
Lauren.Hoyt-Williams@lplfinancial.com