



## LPL Financial, Synergy Wealth Alliance Welcome Two New Financial Advisors

Feb 15, 2022

CHARLOTTE, N.C. , Feb. 15, 2022 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA) announced today that financial advisors Guy Blakey, CFP® and Karl Willard, CFP® have joined LPL Financial's broker-dealer, corporate registered investment advisor (RIA) and custodial platforms, aligned with [Synergy Wealth Alliance](#), an existing LPL firm. The advisors reported to LPL that they served approximately \$320 million in advisory, brokerage and retirement plan assets,\* and they join from Securities America, part of the Advisor Group network of broker-dealers.

Blakey and Willard met in 1986 working for the same employer. Within about a year, the pair – equally passionate about their work – left to found First Financial Counselors, where they spent years advising their shared clients collaboratively. With a focus on holistic financial advice and wealth management services, the close-knit team, based in Altamonte Springs, Fla., aims to provide comprehensive and personalized financial advice for their clients, many of whom have been with them for decades. They are joined by Connie Memory, their office manager of over 30 years, and Emily Rosenbaum, their administrative coordinator.

"A good number of our clients have been with us since we first opened our doors over three decades ago," said Blakey. Willard added, "They've grown right along with us, and Guy and I want to, above all else, be a catch-all resource for them as they move throughout the different stages of their lives."

The advisors chose to align with LPL and Synergy to establish a business continuity plan to help better serve their clients now and in the future. "We knew that this was the right move for us as soon as we met the team at Synergy. The synchronous culture, the character of the advisors, and their way of doing business fit us perfectly – and more importantly, we felt our clients would benefit from the transition," Willard said. "With LPL's seamless technologies and operations, we were certain in our belief that this move would help us to better provide for and serve our clients in the long run. We value them tremendously and want to ensure that they are taken care of for generations to come."

Chris Bordner, Synergy Wealth Alliance CEO, said: "We couldn't be happier to expand our team with the additions of Guy and Karl. Our name – Synergy – represents our commitment to operating as a tight-knit, high-performance team with differentiated strengths, capabilities and resources – offering a higher level of service to our clients and producing greater results than we would singularly. Karl and Guy are an excellent addition to this culture, and we are proud to offer them a place where they can grow both as a team and draw on the resources and knowledgebase of our advisors."

Scott Posner, LPL executive vice president, Business Development, said: "We warmly welcome Guy and Karl to LPL, and congratulate Synergy on expanding its network. Guy and Karl are clearly dedicated to their clients, an attribute we value greatly here at LPL. We are proud to provide them with our resources, including our robust business solutions and integrated technologies, so they can build a solid succession plan with the Synergy team. I offer my best wishes to both, and am looking forward to witnessing their continued success."

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 nearly 20,000 financial advisors, and approximately 800 institution-based investment programs and 500 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 Kehler Bielan Research & Consulting Annual TPM Report); Fortune 500 Company as of June 2021. LPL and its affiliated companies provide financial services only from the United States.*

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

Securities and advisory services offered through LPL Financial LLC, an SEC-registered broker-dealer and investment advisor. Member FINRA/ SIPC

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First Financial Counselors, Synergy Wealth Alliance and LPL Financial are separate entities.

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