Financial Advisor My Ton Opens Texas Office With LPL Affiliated Intrua Financial

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CHARLOTTE, N.C. , Aug. 24, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisor My Ton has joined Intrua Financial, an independent wealth management firm affiliated with LPL Financial. She reported having served approximately $180 million in advisory, brokerage and retirement assets.* She joins LPL from Wells Fargo Advisors Financial Network.

Ton will expand Intrua Financial's reach in Texas by opening its newest branch in Wichita Falls. With the freedom to operate her practice on her own terms, she has made it a mission to transform the way clients view and manage their wealth. Her goals are to alleviate financial uncertainty, build stability and accumulate long-term wealth for her wide range of clients. As Ton builds out her new practice, she is determined to cultivate a strong and uplifting culture.

"My goal is to build a practice rooted in strong corporate and client values, and to create an environment to attract like-minded advisors, clients and staff," Ton said. "There's an amplification effect where there is positive synergy."

Having 20 years of experience as an entrepreneur in a diverse range of industries, Ton has successfully launched eight businesses and completed two acquisitions. Ton's dynamic background in market innovation allows her to manage clients' finances and portfolios in a holistic, growth-oriented manner. By applying a hands-on, personal approach to serving her clients, she aims to understand and anticipate their financial needs while establishing trust and rapport.

Why LPL Financial is a top choice

Intrua Financial was founded in 2015 and specializes in business, estate and tax planning. Intrua advisors believe their work is more than building wealth — it is about building lives and futures. Intrua's services are backed by innovative technology, comprehensive resources and the support of LPL Financial.

"It was important for me to find strategic partners whose values and mission are aligned with my goals. Intrua and LPL offer exactly what I was looking for — they put advisors at the core of their business," said Ton. "By joining Intrua, I can enjoy true independence and best serve my clients while having access to resources at scale. LPL's full suite of custodial services and business solutions provide the top-quality support I need to operate my independent practice and improve client experience."

Scott Posner, LPL executive vice president, Business Development, said, "We extend our warmest welcome to My and congratulate her on joining Intrua Financial. My's vision of transforming her clients' wealth inspires us all, and we are honored to be a trusted partner that amplifies her accomplishments. At LPL, we continue to reinvest in our unparalleled services and robust capabilities, which empower our advisors with evolutionary tools to guide their clients. We look forward to a fruitful partnership with My for many years to come."

Related

Learn more about Intrua Financial.

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 21,000 financial advisors, and approximately 1,100 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.

**Value approximated based on asset and holding details provided to LPL from year-end 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 since June 2021. LPL and its affiliated companies provide financial services only from the United States.*

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.

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