LPL Financial

LPL Financial Welcomes Advisor Matt Irwin

January 3, 2023

CHARLOTTE, N.C., Jan. 03, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Matt B. Irwin has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $160 million in advisory, brokerage and retirement plan assets*, and joins LPL from Ameriprise.

Based in Dallas, Matt is celebrating his 25th year in the industry. He grew his solo practice from the ground up, offering comprehensive financial planning, asset management, retirement income strategies and education savings, among other services. "Where I thrive is in my ability to play defense with investments in unfavorable market conditions to help my clients feel confident, connected and in control of their financial lives," said Matt, who is supported by longtime administrative assistant Alicia Boone.

The market fluctuations over the past two years prompted him to search for a new wealth management firm. After extensive research, Matt chose to move to LPL for its enhanced resources and commitment to each advisor's success.

"I really appreciate LPL's independent platform where we have more investment choices and increased flexibility in how we serve clients. I now have access to a wide range of products and services that will help us provide clients with differentiated experiences," he said. "LPL offers the freedom and independence to run my practice on my own terms, with no influence from proprietary products."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Matt and are honored he saw value in partnering with LPL to help enhance his practice and elevate his clients' service experiences. At LPL, we are committed to providing ultimate choice and flexibility. We will meet advisors where they are in the evolution of their practice and support them with a range of innovative capabilities and robust resources to help them serve their clients as they see fit. We wish Matt great success in the future."

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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 21,000 financial advisors, including advisors at approximately 1,100 institution-based investment programs and at approximately 500 registered investment advisor ("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 1996-2022); among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 on Financial Institution Market Share; No. 1 on Share of Advisors. (2021-2022 Kehrer Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

LPL and its affiliated companies provide financial services only from the United States.
Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. Advisor Matt Irwin and LPL Financial are separate entities.

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.

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