



## Maher Wealth Management Launches With Support of LPL Strategic Wealth Services

Feb 27, 2023

CHARLOTTE, N.C., Feb. 27, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Thom Maher CFP®, CRPC, has launched an independent practice, [Maher Wealth Management](#), through affiliation with [LPL Strategic Wealth Services](#), a modern breakaway solution for advisors seeking to gain more control over their business. Maher reported having served approximately \$440 million in advisory, brokerage and retirement plan assets\*, and joins LPL from Merrill Lynch.

Based in Phoenix, Ariz., Maher is registered in 30 states and offers comprehensive financial planning and wealth management to multigenerational families. Over the years, he's found a niche in primarily serving women business owners, professionals, widows and retirees. His approach to serving clients starts by attentively listening and taking time to learn each client's purpose and goals for their money. "We really want to make sure that the values clients hold dear to them are passed down through the generations, not just the value of the accounts," said Maher, who is joined by Client Services Manager DeAnn Welch and Client Services Specialist Mary Mann.

Growing up, Maher saw first-hand his family's financial struggles. He worked two jobs to help pay his parent's mortgage and made it a priority to learn more about money management. That focus on financial education led to his career as an advisor. "I wanted to make sure I didn't have the problems that my folks did, and I wanted to be able to help others understand how to manage money in pursuit of financial wellness," he said.

### Video: [Meet Thom Maher](#)

Looking to keep his clients' best interest at the forefront of everything he does, Maher decided it was time to break away from the wirehouse environment and build an independent practice with the support of LPL Strategic Wealth Services.

"Through the due diligence process, it became very clear to me that our clients would be best served at LPL," Maher said. "LPL's comprehensive support, technology and research, along with its model of transparency and dedication to independence and choice, allows us to provide a wide range of diligently evaluated, non-proprietary products and personalized experiences. We believe LPL provides an enormous catalog of services, as well as a long history of financial stability, and we're very excited about the future of our business."

Maher also appreciates the added layer of "behind the scenes" support from LPL Strategic Wealth Services. Advisors who join Strategic Wealth have access to LPL's integrated wealth management platform, along with an added layer of ongoing strategic support for daily operations and long-term business management. They benefit from a truly integrated service that includes simplified pricing, technology and dedicated support to launch their practice. Then, after the transition is complete, Strategic Wealth teams receive ongoing operations support managed by a team of experienced professionals including a business strategist, marketing partner, CFO and administrative assistant. Advisors have one point of contact and a dedicated team, ultimately allowing them to stay focused on the enduring needs of their clients, culture and evolution of their practice.

Outside the office, Maher is a proud father of Jett, an Aerospace engineer at Raytheon, and daughter Brooklyn, who just graduated in Nursing from UofA. Maher also devotes time to the Anthon Legacy Foundation, which he founded in 2020 with his wife Angela to help pass along their family's values to future generations. To date, the foundation has contributed to many community organizations including EVIT, a college-prep and vocational training school where Maher volunteers, and Gompers, an organization that assists individuals with severe disabilities. Maher is also a puzzle enthusiast, currently working on an 18,000 piece jigsaw puzzle. He enjoys solving the complexities within each puzzle and connecting the pieces—both traits that translate to the financial services world as connects strategies to build a financial plan.

Scott Posner, LPL Executive Vice President, Business Development, added, "It is an honor to welcome Thom to the LPL community. We congratulate him on the launch of his independent practice and are committed to supporting him each step of the way. At LPL, we constantly strive to innovate our capabilities and wealth management solutions to help advisors differentiate their practice, grow their business and elevate their client experiences. We look forward to a long-lasting and productive relationship with Maher Wealth Management."

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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 enterprises 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 2022.*

*\*\*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.*

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CRPC conferred by College for Financial Planning

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