LPL Financial

# LPL Financial Welcomes Lanier Wealth Management

Mar 2, 2023

CHARLOTTE, N.C., March 02, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA)  announced today that financial advisor Timothy Lanier CFP®, CRPC has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $300 million in advisory, brokerage and retirement plan assets*, and joins LPL from VALIC Financial Advisors, the broker-dealer for AIG Retirement Services.

Based just outside of Jacksonville in Neptune Beach, Fla., the team at Lanier Wealth Management provides financial planning and investment advice to a niche client base of highly compensated health care executives and physicians. "We focus on planning with a purpose, starting with the question 'What's your why?,' and then we build a personal portfolio and financial plan around that," Lanier said. "It is so fulfilling to help clients make sense of their personal family finances in a way that helps them pursue their larger life goals."

Lanier has made it a point to constantly grow and evolve as an advisor, earning multiple accreditations and staying on top of industry happenings since he became a financial advisor in 2009. He is deeply committed to doing what's best for his clients. In that spirit, he chose to move his business to LPL.

"I'm at a point in my life and career where being a wirehouse advisor isn't the best fit for my business," Lanier said. "LPL opens up a world of financial solutions and innovative technology that will help put my clients in the best position possible. I now have more choice and flexibility to build my practice the way that suits me, backed by industry-leading capabilities and a large service organization that will help me operate in a more efficient way."

Scott Posner, LPL Executive Vice President, Business Development, added, "We extend a warm welcome to Tim and congratulate him on the move to independence. With more freedom and flexibility, financial advisors who choose LPL gain more ability to work smarter and thrive. Our advisors and enterprises are our No. 1 focus, and we are steadfast in our commitment to providing them with innovative capabilities and other wealth management resources that deliver value and help meet the relevant needs of their clients. We look forward to supporting Lanier Wealth Management for years to come."

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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 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.*

*LPL Financial and its affiliated companies provide financial services only from the United States.*

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

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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