Financial Advisor Joaquin Lopez Joins LPL Financial

Mar 22, 2023

CHARLOTTE, N.C., March 22, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Joaquin Lopez of Lopez Wealth Management has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $130 million in advisory, brokerage and retirement plan assets*, and joins LPL from Lincoln Investment Planning.

Based in Cranberry Township just north of Pittsburgh, Pa., Lopez is a U.S. Army Veteran who served in active duty during Operation Desert Shield. Upon his return home, he became a counselor with the PA Public School Retirement System and then joined the financial services industry, where he has spent the past 23 years building a boutique practice that specializes in helping public school educators.

"I really focus on retirement planning, account accumulation and distribution, and building portfolios to help clients with their short term and long term needs," Lopez said. "As an independent advisor, I've made excellent customer service a priority."

Looking for enhanced technology, more home office support and a broader service model to meet the evolving needs of his clients, Lopez turned to LPL for the next chapter of his business.

"At LPL, my client's digital experiences will be greatly enhanced, especially with the mobile app that will allow them to access their account information on the go," Lopez said. "I also value the lower-cost fee-based platforms that I now have access to in order to find the most suitable investments for my clients, who vary a great deal in account value, income and distribution needs."

Scott Posner, LPL Executive Vice President, Business Development, stated, "It is a pleasure to welcome Joaquin to the LPL community. We are committed to investing in robust, integrated technology capabilities designed to help advisors build successful practices and provide clients with differentiated experiences. We look forward to supporting Lopez 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.*

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