



Sheehan Wealth Partners Joins LPL Strategic Wealth Services

Apr 20, 2023

CHARLOTTE, N.C., April 20, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisors James Sheehan CFP®, CPWA®, and Shawn Tighe CFP®, have joined LPL Financial's broker-dealer, RIA and custodial platforms. They become the 30th team to join [LPL Strategic Wealth Services](#), the firm's modern supported independent solution that enables advisors to grow their business according to their vision. The advisors reported having served approximately \$450 million in advisory and brokerage assets*, and they join LPL from Raymond James.

Sheehan is a veteran of the financial services industry with more than 25 years of experience. He's also a decorated U.S. Marine Corps veteran, serving since 1993, holding the rank of Major. His passion for both careers is fueled by the joy he gets from helping people. Known for his consistency and attention to detail, Sheehan has significant experience in retirement income planning, estate and charitable planning, tax planning, education planning, asset management and liability management.

Tighe joined the industry in 2013 and has an extensive knowledge of market conditions. His focus is to help clients with personalized investment management, retirement planning and generational wealth transfer. He also has experience working with business owners and brings a unique perspective, having observed his own family's business from a young age.

"Shawn and I work well together combining our intellectual capital," Sheehan said. "We share conservative investment values and a financial planning background, along with a commitment to service. It is our mission every day to make a meaningful difference in the lives of our clients by helping them work toward financial security and more confidence."

The advisors specialize in serving the financial needs of corporate executives and energy industry professionals, with the bulk of their clientele at ExxonMobil. They are guided by six core principles: trust, integrity, stability, stewardship, service and communication.

Looking to enhance their practice, elevate service experiences and become more of a family office, [Sheehan Wealth Partners](#) chose to move to LPL.

"After considering all available options, we concluded that the needs of our clients and firm would be best served by partnering with LPL Financial," Sheehan said. "Ultimately, we want to provide more services to our clients and we believe LPL will enable us to grow our team and deliver more experiences and enhance how we do business. We also appreciate LPL's integrated technology and open architecture, along with access to better planning tools and client reporting."

Making the move to LPL Strategic Wealth Services

It was important for Sheehan and Tighe to have independence, but they also wanted the backing of a dedicated support team. That's why they chose [LPL Strategic Wealth Services](#), which is designed for advisors who want to own their business, control the client experience and limit operational and business management distractions.

Advisors who use 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 at LPL. 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 dedicated resources, ultimately allowing them to stay focused on the needs of their clients, culture and evolution of their practice.

Sheehan Wealth Partners will also tap into LPL Private Client Services Network, which gives advisors access to vetted reputable companies to provide a personalized, full-service option to their clients. Sheehan will use the network's tax services for ultra-high-net-worth clients.

Outside of work, both advisors are committed to giving back to their community. Sheehan contributes to the organization Folds of Honor, volunteers at Meals on Wheels, and is an active member of Seacoast Church in Mt. Pleasant, South Carolina. Tighe remains an active member of St. Therese Catholic Church.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We extend a warm welcome to James and Shawn and congratulate them on this next step in their journey to differentiate themselves in the marketplace. At LPL, our goal is to be the leading partner to advisors by meeting them where they are in the evolution of their practice. We are committed to investing in innovative capabilities and resources to help their businesses thrive, both operationally and strategically. We look forward to a long-lasting and successful relationship with Sheehan Wealth Partners."

Related

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 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 Kehler Biel 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. Sheehan Wealth Partners 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.

Connect with Us!

<https://twitter.com/lpl>

<https://www.linkedin.com/company/lpl-financial>

<https://www.facebook.com/LPLFinancialLLC>

<https://www.youtube.com/user/lplfinancialllc>

Media Contact:

Media.relations@LPLFinancial.com

(704) 996-1840

Tracking #1-05367389