



Advisor Amy S. Lawrence Joins LPL Financial to Launch Independent Practice

Jun 5, 2023

CHARLOTTE, N.C., June 05, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor [Amy S. Lawrence](#) has joined LPL Financials' broker-dealer, RIA and custodial platforms. She reported having served approximately \$475 million in advisory, retirement plan, banking and credit business* and joins LPL from Bank of America Private Bank.

With the move, Lawrence launches [Gorilla Investments Co.](#), a Miami-based independent financial practice. She named the firm Gorilla Investments to represent the strength of the financial services clients will receive and the power of her client base of high-net-worth investors.

Since 2016, Lawrence has grown her practice by working closely with private business owners, entrepreneurs, executives and affluent families to help define, pursue and integrate their financial priorities. Her approach is collaborative and thoughtful, with the goal of helping clients address the many complexities of their finances before enacting strategies that leverage Gorilla Investment Co.'s many solutions. Lawrence also supports business owners with guidance on succession planning and exit strategies and helps deliver professional oversight to support their post-sale wealth-management needs.

"We focus on what makes each client's wealth journey unique and then empower them with the right strategy and plan for them," said Lawrence, who is joined by Client Relationship Manager Rey Lawrence. "We are committed to being there for our clients every step of the way, supporting them as they navigate complex life choices and relationships."

Lawrence is attuned to the economic conditions that have attracted wealthy people to South Florida, and frequently serves as a guide to help weigh the financial, business, personal and philanthropic decisions that accompany a relocation to the state. Deeply involved in the community, Lawrence serves as the President of the Miami Finance Forum and the Southeast Regional Director of the Hedge Fund Association.

"I am thrilled that Gorilla Investments Co. has decided to launch in the vibrant city of Miami," said Miami Mayor Francis Suarez. "The commitment of Amy and her team to providing exceptional financial services aligns perfectly with our vision to become the 'capital of capital.' Together, we'll continue to foster a thriving ecosystem that attracts top talent and drives economic prosperity."

Why LPL Financial?

Lawrence considered several wealth-management firms, and asked to see their user platforms and details about the overall client experience. After careful consideration, she chose LPL as the best fit for her clients and business.

"I'm excited about LPL, a strong Fortune 500 company with an award-winning** platform and incredible digital tools that will significantly enhance how we operate," Lawrence said. "We now have the power to do what we need today and in the years ahead. With LPL we have access to a wider range of offerings, resources, innovative tools, and capabilities that will increase both the speed and quality of our services."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We warmly welcome Amy to the LPL community and congratulate her on the launch of Gorilla Investments. Launching a new business on our independent platform is an exciting step and we are honored to be Amy's partner for the next chapter of her highly successful career. At LPL, we will continue to leverage our scale to invest in robust resources, business solutions and integrated capabilities designed to help advisors differentiate their practice, meet the evolving needs of their clients and build their business with long-term value in mind. We look forward to supporting Gorilla Investments for years to come."

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About LPL Financial

LPL Financial Holdings, Inc. (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-mediated advice 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.

Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. Gorilla Investments

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We routinely disclose information that may be important to shareholders in the “Investor Relations” or “Press Releases” section of our website.

**Value approximated based on asset and holding details provided to LPL from year-end 2022.*

***Model Wealth Portfolios (MWP) advisory platform won the Money Management Institute/Barron’s 2022 Industry Award for Wealth Management Platform of the Year. The award honors wealth management firms whose investment advisory platform exemplifies innovation in delivering better outcomes for investors and financial advisors.*

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