LPL Financial Welcomes Financial Advisors Steve Boeckmann and David Wyzgowski

Aug 30, 2023

CHARLOTTE, N.C., Aug. 30, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC] announced today that financial advisors Steve Boeckmann, CFP®, ChFC® , CRPC® and David Wyzgowski have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $350 million in advisory, brokerage and retirement plan assets*, and join LPL from VALIC Financial Advisors, the broker-dealer for AIG Retirement Services.

With the move, the pair launches BW Wealth Management, an independent financial practice based in Scottsdale, Ariz. With more than four decades of wealth management experience between them, the advisors share a passion for helping their clients create personalized financial plans designed to help them make the most of their retirement years.

"Steve and I play an integral role in the lives of our clients because they trust us with the result of their life's work," Wyzgowski said. "No two clients are alike, which is why we take the time to understand their unique financial situations, as well as their goals and objectives, to help put them on the right path to a more confident fiscal future."

Looking to pair their client-centered philosophy with their desire to move to independence, the team – which also includes Operations Manager Natalie Wyzgowski, CRPC®, who is David's wife – interviewed several wealth management firms before selecting LPL as the best fit for their business.

"We started BW Wealth Management to provide our clients with a superior client experience, and by partnering with LPL we are able to do just that," Boeckmann said. "With access to innovative and streamlined technology, integrated capabilities and strategic support, LPL makes it easy for us to focus on our clients and provide them with the information necessary to help them make educated and strategic financial decisions."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Steve, David and Natalie to the LPL community and are inspired by their client-centered philosophy. We are committed to supporting their goal of providing an elevated client experience by investing in innovative capabilities and resources necessary to help them work toward that success. We look forward to supporting BW Wealth Management 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, serving nearly 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 550 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated 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.*

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