LPL Financial

# LPL Financial Welcomes Validus Financial Associates

Sep 6, 2023

CHARLOTTE, N.C., Sept. 06, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Validus Financial Associates has joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $800 million in advisory, brokerage and retirement plan assets*, and joins LPL from Lincoln Financial Group.

Based in Peoria, Ariz., the firm is led by senior partners Ryan S. Kidd, CRC® and Aaron C. Montez, CFP®, who collectively have more than 40 years of industry experience. The advisors worked together as colleagues for several years before founding Validus in 2009 as a full service financial advising firm committed to putting the needs of clients and their families first. They are joined by partner Andy St. John CFP® and fellow advisors Andrew Peronia, Andrew Tuell, Marcus Luckeneder, Sean Guill and Kurt Oswald, along with four support staff members.

"At Validus, there is nothing we take more seriously than our reputation of integrity," Montez said. "We have always been fully committed to putting clients first, and we take into consideration what matters most for each client's unique financial situation. Following a fiduciary standard, we will act accordingly to provide clients with the utmost confidence that they are on the right track toward financial success."

Kidd is author of "The Art of Retiring Whole," a non-financial guide to retiring with purpose, productivity and "endless possibilities." He said the advisors take a hands-on approach to portfolio construction and investment management. Their goal is to be a valuable resource to serve others and provide clients with a financial foundation that enables them to enjoy life now, knowing that their future is on the right course.

**Why the team chose LPL**

After a thorough examination of their business, the Validus team recognized they could serve clients more effectively and efficiently by moving to LPL.

"As an industry leader, LPL has the size and scale to create enhanced experiences for our clients, especially in terms of technology capabilities," Kidd said. "LPL provides access to a wide range of integrated digital tools that will enable us to work smarter, in turn giving us more time to focus on clients. Also, the end-user technology will give our clients more features and abilities, including an app and single sign on, with a more modern look and feel."

Additionally, the partners want to continue growing their team with other like-minded advisors, and they believe LPL offers a more competitive recruiting advantage.

Outside of work, the team is dedicated to giving back to the community by volunteering at church and local foodbanks. They also teach financial planning classes for area high school students.

Scott Posner, LPL Executive Vice President, Business Development, stated, "It's an honor to welcome Ryan, Aaron and the entire Validus team to the LPL community. Our sole focus is to empower advisors by providing them with differentiated resources and capabilities to deliver more value to clients and run thriving businesses. We look forward to the journey ahead with Validus Financial Associates as they build their ideal practice."

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**About LPL Financial**

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that LPL should work for advisors and enterprises, 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 professional. At LPL, independence means that advisors and enterprise leaders have the freedom they deserve to choose the business model, services and technology resources that allow them to run a thriving business. They have the flexibility to do business *their* way. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors and enterprises, 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. Validus Financial Associates 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.

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.*

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