LPL Financial

LPL Financial Welcomes Wealth Management and Legacy Planning Group

Sep 25, 2023

CHARLOTTE, N.C., Sept. 25, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Angelo Burns, Larisa Holiday, Eli Montoya and Manny Pedroza have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported having served approximately $260 million in advisory, brokerage and retirement plan assets*, and joins LPL from Corebridge Financial, formerly Valic, part of AIG.

With headquarters in Albuquerque, NM, the diverse practice is led by Senior Advisor Angelo Burns, who joined the industry in 2007. He grew the firm over time, understanding that clients could be better served by a team approach, with each advisor bringing different strengths to the group. The four advisors are joined by Client Services Associate Melinda Martinez.

"We specialize in financial education and breaking down complex financial situations to a place where clients can better understand and be more comfortable with their decisions," Burns said.

For the past few years, the team has primarily operated in the 403(b) retirement space, working closely with hospitals, universities, schools and other non-profit groups. Looking to expand their services, the team rebranded to Wealth Management and Legacy Planning Group with their move to LPL.

"We've met so many wonderful clients through the retirement space, but as those client relationships expanded so have their needs," Burns said. "This is a service industry and our vision is to be able to go deeper with our client relationships and expand our reach. With this move to LPL, we have access to a large suite of investment products and open architecture platforms that provide choice and flexibility, which allows us to serve clients in a greater capacity."

Burns also noted that the move to independence allows the team to follow a fiduciary standard, without corporate influence or proprietary investment products.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Angelo, Larisa, Eli, Manny and Melinda to LPL and applaud their mission to enhance the client experience and offer more services. We are committed to delivering robust resources, business solutions and innovative capabilities that can help our advisors differentiate their practice and succeed at every stage of their business' lifecycle. We look forward to a long-lasting relationship with the entire team at Wealth Management and Legacy Planning Group."

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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.

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

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