LPL Financial Welcomes the Return of Advisors Amy LeGate and Larry Silverman

Oct 19, 2023

CHARLOTTE, N.C., Oct. 19, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Amy LeGate CFP® and Larry Silverman CFP® have rejoined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $150 million in advisory, brokerage and retirement plan assets*, and come to LPL from Ameriprise Financial.

Located in the Dallas suburb of Frisco, Texas, the seasoned advisors have worked together since 2000 and said their shared client-centric commitment led them to launch their independent practice, Silverman, LeGate and Associates, LLC. Working as a team, LeGate and Silverman have built a reputation as advisors who take a vested interest in their clients by understanding their financial goals and objectives and providing a basic financial education so clients can be actively involved in the financial planning process.

"Our firm philosophy is that we will not invest our clients' money until we get to know them, their risk tolerance and their financial goals," LeGate said. "Over the course of several meetings we learn about our clients' aspirations and work with them to devise a financial plan. Education is a huge component of that plan, and we help our clients learn how to ask the right questions about the products and strategies we are offering."

Looking for more autonomy as well as resources to provide an elevated client experience, LeGate says making the move back to LPL was an easy decision.

"We are coming back to LPL after being away for four years, and in that time you can tell LPL spent a lot of time listening to advisors and developing the tools and technology that makes it easier for us to focus on our clients," LeGate said. "Making the move back to LPL gives us access to their streamlined and integrated technology and strategic business resources that will allow us to spend more time with our clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We are thrilled to welcome Amy and Larry back to the LPL community. We applaud their continued commitment to providing an elevated client experience and are honored they recognized that LPL's integrated capabilities and robust resources will help them provide more value to their clients and allow them to grow their business their way. We look forward to supporting Silverman, LeGate and Associates, LLC 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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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840
Tracking Number: 492058