LPL Financial

LPL Financial Welcomes GER Loftin Wealth Advisors

Nov 6, 2023

SAN DIEGO, Nov. 06, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that GER Loftin Wealth Advisors has joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $225 million in advisory, brokerage and retirement plan assets*, and join LPL from United Planners Financial Services.

Located just outside Alpharetta in Johns Creek, Ga., GER Loftin Wealth Advisors is led by co-founders U.S. Air Force veteran James Loftin CFP®, CKA and U.S. Army National Guard veteran George Rall, Jr. RFC® who have a combined six decades of wealth management experience. The pair began working together in 2010 and have built a faith-based business focused on cultivating long-term relationships with their clients by providing a focused and individualized approach to wealth management.

"We start by understanding our clients' aspirations and objectives, then we help them put together a financial strategy based on their short and long-term goals," said Rall. "We enjoy educating clients about personal finance and watching our relationship grow through the years as we help them on life's journey."

"We are educators at heart and we truly believe that an informed client is the best client," said Loftin, who is the 2023 and 2024 President of the Financial Planning Association of Georgia. "When working with our clients, we have a coach to player relationship. No matter where they are starting, or what their financial goals are, we are with them every step of the way."

In addition to educating clients, Loftin and Rall take a vested interest in attracting the next generation of financial advisors through a robust mentorship program aimed at teaching local high school and college students about the wealth management industry. To date, more than 35 students have completed the year-long program.

It was their client-centric commitment that led the GER Loftin team – which also includes Chief Operating Officer Cindy Scheffler, Financial Advisors David Harvey, Jack Metzger and Keir Pienaar as well as their support staff – to select LPL as the right fit for their business.

"We looked at nearly a dozen firms, but when we saw everything LPL offered and heard all the positive reviews from our industry peers, it was a no-brainer," Loftin said. "From their service model and comprehensive support to their integrated and innovative technology – everything LPL offers shows they are committed to helping us provide an exceptional client experience."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome James, George and the rest of the GER Loftin team to the LPL community and applaud 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 GER Loftin Wealth Advisors 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 advisors and enterprises, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 560 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. GER Loftin Wealth Advisors 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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