



LPL Financial Welcomes SYV Wealth Advisors

Nov 8, 2023

SAN DIEGO, Nov. 08, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) (Nasdaq: LPLA) announced today that financial advisors Brad Sicoff CRPC® and Bruce Porter CFP® of [SYV Wealth Advisors](#) have joined LPL Financial's broker-dealer, RIA and custodial platforms. They are joined by their Director of Operations, Molly Ware. The team reported having served approximately \$115 million in advisory, brokerage and retirement plan assets*, and joins LPL from Cambridge.

Prior to becoming an advisor, founding partner [Bruce Porter](#) served 25 years in the United States Army and retired as Colonel in 2001. He then shifted focus to the financial service industry where he has become an integral part of his community. He founded SYV Wealth Advisors in 2017, launching an independent business where he had more flexibility to build his ideal practice and put clients first. He has deep local roots and is highly active in the Santa Ynez, Calif., community, where he serves on numerous boards and foundations.

SYV Wealth expanded in 2022 bringing in partner [Brad Sicoff](#), a former veteran wholesaler in the annuity field. For more than two decades, Sicoff worked with and coached many financial advisors on retirement income planning. Sicoff's extensive background has prepared him for this new chapter in life. Sicoff is committed to continuing Porter's legacy and building on his vision for the practice.

"With LPL being an all-encompassing firm and its own custodian, we believe it will be much easier to service our clients and lower costs," Sicoff said. "[LPL's innovative technology](#) is streamlined and more user-friendly, and its integrated capabilities will help us be more efficient. We think clients will appreciate the consolidated statements and digital tools available to access their account information. Ultimately, we will be able to serve clients more effectively, which is what they deserve."

Scott Posner, LPL Executive Vice President, Business Strategy & Growth, stated, "We welcome Bruce and Brad to the LPL community and wish them great success in the next chapter of their journey. We are inspired by their foresight to develop a thoughtful business plan that is guided by their commitment to their clients. Our advisors are our entire focus, and we are committed to making continuous investments in innovative capabilities to help them protect their legacy and take care of their clients well into the future. We look forward to a long-lasting relationship with SYV Wealth Advisors."

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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 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. SYV 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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Media Contact:

Media.relations@LPLFinancial.com

(704) 996-1840

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