LPL Financial

LPL Financial Welcomes Upstate Financial Network

Dec 19, 2023

SAN DIEGO, Dec. 19, 2023 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Mark Hills and Uri “Chip” Doolittle V, CFP®, AIF® of Upstate Financial Network have joined LPL Financial’s broker-dealer, RIA and custodial platforms. They reported having served approximately $200 million in advisory, brokerage and retirement plan assets*, and join LPL from Triad Advisors, part of the Osaic network (formerly Advisor Group).

Headquartered in Manlius, N.Y., Hills and Doolittle merged their individual practices in 2016. After a chance meeting at an industry conference, the industry veterans discovered they shared the same client-centric, knowledge-based values, as well as the desire to go independent. Together, they have earned a reputation as an all-inclusive, kind, and understanding advisory firm focused on individuals and businesses looking to grow and preserve their wealth.

“Our goal is for our clients to feel like they’re part of our team,” Hills said. “We take the time to understand all the intricacies and details of our clients’ financial picture and then work alongside them to develop a tailored plan designed to help them realize their financial aspirations.”

Looking for a partner to provide them with the resources and support necessary to elevate their client experience, The Upstate Financial Network team – which also includes Financial Advisors Jeffrey Reisner and Josh Quilty-Koval, Administrative Assistant Mindy Holgate and associate Robert Doolittle, who is Chip’s son – turned to LPL.

“With so much consolidation and change in the wealth management industry, it’s more important than ever to find a partner that works tirelessly to support its advisors. It was evident from our first meeting that LPL is that partner,” Doolittle, the 2017 President of the Financial Planning Association of Central New York, said. “From LPL’s streamlined technology to its back-end support, this partnership will provide us with the resources to work more efficiently and effectively, ultimately allowing us to focus more on the reason we got into this business in the first place – our clients.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome Mark, Chip and the rest of the Upstate Financial Network to the LPL community and applaud their client-centered focus. At LPL, we understand the desire to provide an elevated and focused client experience, and we are committed to investing in innovative capabilities and business solutions designed to help advisors focus on their clients and grow their business their way. We look forward to supporting Upstate Financial Network 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 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 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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