LPL Financial Welcomes Helmsman Financial Strategies

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SAN DIEGO, Jan. 09, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Peter Manning, CPA, PFS of Helmsman Financial Strategies has joined LPL Financials' broker-dealer, RIA and custodial platforms. The firm reported serving about 200 individual clients with approximately $175 million in advisory assets* and joins LPL from Cambridge.

Much like a ship's helmsman pilots through turbulent waters, Manning has helped guide clients to and through retirement for over two decades. Based in Burlington, Mass., Manning is a Certified Public Accountant who focuses his wealth management practice on providing financial planning and investment management integrated with tax planning. He is joined by an operations manager and a financial analyst, along with "Jack Jack," the office cat.

"I see my role as being somewhat of a family CFO, helping clients with all financial aspects of their lives, whether that's buying a car or finding a second home or downsizing to assisted living," Manning said. "I want to help clients understand and maximize their financial resources and make sure they are comfortable every step of the way."

Looking for state of the art & innovative capabilities to elevate the client service experience, Manning turned to LPL for the next chapter of his business.

"I was immediately impressed by LPL's devotion to high-quality innovative technology and business resources — everything from the Trading platform to the Research team — that sets them apart from others in the industry," Manning said. "The complete integration of their systems allows us and our clients to log into only one place to find the full financial picture. This integration saves time on administrative duties and provides clarity for clients to enhance the overall experience."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Peter to the LPL community and are honored he chose to partner with us as he seeks new ways to be a more meaningful part of his clients' financial stories. We are committed to delivering robust resources, business solutions and innovative capabilities that can help all our advisors differentiate their practice and be successful at every stage of their business' lifecycle. We look forward to a long-lasting relationship Helmsman Financial Strategies."

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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.

**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #523009