LPL Financial Welcomes Maier & Associates Financial Group, Inc.

Jan 22, 2024

SAN DIEGO, Jan. 22, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Wayne Maier and the team at Maier & Associates Financial Group has joined LPL Financial's broker-dealer, RIA and custodial platforms. The firm reported serving approximately $615 million in advisory, brokerage and retirement plan assets* and joins LPL from Raymond James Financial Services.

With more than 45 years of industry experience, Wayne founded Maier & Associates Financial Group in 1984 with a goal of providing comprehensive services based on clients' best interests. The Bay City, MI., practice has since evolved into a three generation, community-focused legacy business that includes fellow financial advisors Joseph Maier, Michael Wilcox, Greg Dahlberg, Sharyn Dansa and Logan Maier, paraplanners Adam Wohlschied and Bret Naylor, CFO Laura Maier and seven support staff members.

"At Maier & Associates, when we say the client comes first it's not a cliché. This is who we are," Wayne said. "Everything we do is to help our clients build wealth and plan for the future based on their comfort level, with their best interests in mind. We tell our clients, 'When you invest with our company, you're partnering with a family that will manage its money like it's managing its own.'"

Their commitment to excellence prompted the team to find a new wealth management firm to partner with for the next chapter of their business. They turned to LPL after an in-depth search, recognizing LPL offers more freedom, flexibility and choice.

"We believe it's of upmost importance to have true independence that allows us to operate on our own terms, without corporate mandates and outside influence. We found that at LPL," Wayne said. "This move allows us to stay client-focused, which has been a priority ever since I opened the business. We now have access to a wide range of innovative capabilities and resources that will enhance client experiences, and we have the ability to decide what tools we want to use to better our service."

The firm is deeply committed to giving back to the community through the Maier & Associates Charitable Foundation. In addition, Wayne and team have supported numerous charities over the years including Toys for Tots, Boys & Girls Clubs, Good Samaritan Rescue Mission, Toni & Trish House, Safe Harbor Kitchen, Child Abuse and Neglect Council, Johnny Burke Children's Foundation, Power of Dad, Bay Area Women's Center, the 1% food pantry and The Children's Grief Center. For his contributions to the community, Wayne has received the key to the city and numerous local awards.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We extend a warm welcome to Wayne and his team. We are inspired by their unwavering commitment to taking care of their clients and giving back to their community. We look forward to supporting Maier & Associates Financial Group for years to come by offering value-add service, innovative resources and integrated capabilities designed to help them thrive."

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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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