LPL Financial

LPL Financial Welcomes Financial Advisor Blair Waller

Feb 7, 2024

SAN DIEGO, Feb. 07, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Blair Waller, CFP®, has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately $150 million in advisory, brokerage and retirement plan assets*, and joins LPL from Corebridge Financial**,** formerly Valic, a subsidiary of AIG.

With the move, he launches Waller Creek Wealth Management, an independent financial practice based in Austin, Texas. The name of the firm – which is coincidental – is a nod to Waller Creek, a stream that runs through the University of Texas at Austin and is named after the first mayor of the city. Waller, who started in the financial services industry nearly a decade ago, said his goal for the new boutique practice is to cultivate and maintain close relationships with his clients to fully understand their unique financial needs and fiscal objectives.

"I have found that there can be a real fear around addressing personal finances, and my mission is to turn that fear into empowerment through education," Waller said. "I tell clients, 'my goal is to help educate you so you can take an active role in your financial planning process. I want you to get to a place where you can concisely explain to your friends and family how we are managing your money, what kinds of investments you have, why we chose them and how they are performing.'"

Looking to pair his client-centered philosophy with his desire to move to independence, Waller, who is supported by Executive Assistant Cara Kokel, interviewed several firms before selecting LPL as the best fit for his business.

"When I started looking for a partner to launch my own independent practice, I immediately reached out to LPL because I found it hard to believe that the more than 22,000 financial advisors supported by LPL could be wrong," Waller said. "From my first meeting where I was shown LPL's integrated technology and streamlined business solutions , I was incredibly impressed, and I've continued to be impressed ever since. I am confident that by partnering with LPL, I will spend less time performing back-office tasks and doing menial paperwork which will allow me to focus on the reason I got into this industry in the first place – my clients."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Blair and Cara to the LPL community and are honored to support the launch of Waller Creek Wealth Management. At LPL, we recognize what it takes to launch and operate a thriving business, and we are committed to investing in streamlined and integrated business solutions designed to help advisors spend more time with their clients and differentiate their practice. We look forward to helping Waller Creek Wealth Management create their perfect practice for years to come."

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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 570 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 mid-2023.*

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