LPL Financial Welcomes McAnally Investment Group

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SAN DIEGO, March 20, 2024 (GLOBE NEWSWIRE) -- [LPL Financial LLC] announced today that financial advisors Mark McAnally, Josh McAnally and Brandon McAnally, CPA, have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported serving approximately $250 million in advisory, brokerage and retirement plan assets* and joins LPL from Wells Fargo Advisors.

Based in Booneville, Miss., McAnally Investment Group is a family-run business led by Mark, who began his career in 2000 as a solo practitioner. The practice evolved over the years to include Josh and Brandon, who left careers in real estate and accounting, respectively, to join their father and expand the firm's offering. They are assisted by Operations Manager Carlin Crowe. Together, they provide personalized wealth management and financial services for each stage of their clients' lives.

"I started my career with the hopes of building a family business, and my dream has become a reality as we embark on this partnership," Mark said. "As a team and family practice, we take a comprehensive, long-term approach to investment planning and portfolio management to help clients create and preserve their wealth for today and future generations."

In recent years, the team recognized a shift in the industry as more advisors started going independent. Their due diligence process led them to LPL.

"After 24 years of changes from the wirehouses, it became evident that independence is a business necessity," Mark said. "We appreciate LPL's commitment to putting advisors and the client relationship front and center. We now have autonomy and flexibility to build a practice to serve all our clients' evolving needs, with no limitations or required minimums."

Mark added that it was important to partner with a firm that finds merit in Brandon's prior CPA certification and experience in taxation.

"Working with an independent partner will allow us to enhance our relationships with clients and build a practice that truly puts their best interests first," Mark said. "The beauty of being in a small community is our clients are like family. We have very close relationships with them, and this move will give us more options, more flexibility and more personalized services to support their growing needs."

Scott Posner, LPL Executive Vice President, Business Development, said, "It is a pleasure to welcome Mark, Josh, Brandon and Carlin to the LPL community. We're honored this family team turned to LPL as they seek new ways to elevate service experiences and build their ideal practice. At LPL, we remain steadfast in our commitment to being a long-term partner by delivering a sophisticated wealth management platform and robust business tools designed to help advisors differentiate their practice and be successful serving the needs of their clients. We congratulate the McAnallys on the move to independence and look forward to a long-lasting relationship with the entire team."

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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 institutions, 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 institutions 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 institution 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 institutions, 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 #555078