LPL Financial Welcomes Advisor Nolan Venable

Mar 21, 2024

SAN DIEGO, March 21, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Nolan Venable, Enrolled Agent has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $150 million in advisory, brokerage and retirement plan assets* and joins LPL from Osaic.

Venable has been an independent advisor his entire career, founding Wealth Advisors in 1984 with a goal of helping clients with each aspect of their financial lives. His Lafayette, La.-based team takes a holistic approach to wealth management by providing comprehensive financial advice and planning for retirees and pre-retirees. Venable also owns a tax practice and insurance firm in the same building.

"Our clients are looking to build their financial legacy, and we help them on that journey by providing personalized services and customized programs designed to help them grow and preserve assets," Venable said. "I've built this business from the ground up and cultivated many meaningful relationships with clients over the years. Their success is my success, and it is so rewarding to help them work toward financial independence."

In searching for a new wealth management partner, Venable was attracted to LPL's stability in the marketplace, commitment to supporting advisors and integrated technology solutions.

"With LPL's self-clearing capabilities and integrated technology, everything can be accessed seamlessly from one portal. That centralized workflow makes it much easier to do business and will bring more to each client interaction," Venable said. "As client expectations evolve, we need to continue to find ways to create differentiated experiences. We look forward to taking the practice to the next level with this move."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We extend a warm welcome to Nolan and his team and are honored he recognized our platform as a differentiator for his business. We are a committed partner, providing powerful capabilities, innovative technology and robust business solutions to help increase efficiency and create an even better client experience. We look forward to a long-lasting relationship with Wealth Advisors."

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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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