LPL Financial Welcomes Windward Wealth Advisors

Mar 28, 2024

SAN DIEGO, March 28, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Erick Simonds, CRC®, Eugene Sninski, II, and Lisa Sninski have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $250 million in advisory, brokerage and retirement plan assets* and join LPL from Wells Fargo Advisors.

Based in Brick, N.J., Erick and Eugene have worked together as a team for approximately 17 years, with Lisa (Eugene's sister) joining three years ago. All three have deep ties to the community and have grown their practice by cultivating meaningful relationships with local businesses, charities and schools. They use a diversified, risk-based wealth management process to help pre-retirees establish wealth, transition to retirement and plan for their legacy.

In moving to LPL, the three managing partners are proud to launch Windward Wealth Advisors with a nautical theme that pays homage to their seaside community. "Much like a sailor going into the wind will need experience and skill, an advisor needs to be able to change their approach based on market fluctuations to ensure clients end up at their desired destination," Erick said.

"LPL is a strong partner that gives us independence and autonomy so that our service model and investment decisions can be made by the team, outside of corporate mandates or restrictions," Erick said. "Our service model is second to none, with a white-glove approach and family feel. This move will allow us to work with clients in that regard, but with more support in terms of technology, marketing and compliance. We are eager to tap into the entire catalog of LPL's vast resources so we can continue serving clients in the same market we've been in for the last 17 years."

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Erick, Eugene and Lisa to the LPL community and congratulate them on the launch of their new independent practice. We are committed to providing personalized support for each step of their journey as they grow their business on their own terms, evolve with the industry and bring more value to clients. At LPL, we provide ultimate choice and flexibility in how advisors build their perfect practice. We are a partner for the long run, making investments in innovative capabilities and robust business resources designed to help advisors thrive. We look forward to supporting Windward Wealth Advisors for years to come."

Related

Advisors, find your perfect fit at LPL.

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.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial

https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

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

Tracking #558641