LPL Financial

LPL Financial Welcomes Strategic Insights Financial Planning Group

Apr 11, 2024

SAN DIEGO, April 11, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that Strategic Insights Financial Planning Group has joined LPL Financial’s broker-dealer, RIA and custodial platforms. The team of five advisors reported serving approximately $500 million in advisory, brokerage and retirement plan assets* and joins LPL from Ameriprise Financial.

Founded in 1986 by Arthur Hughes CFP®, the McAllen, Texas-based team includes managing partners James Credo CFP®, and James Enriquez MST, EA, CFP®, along with fellow advisors Alexis Villarreal APMA and Leonardo Chang MA, CFP®. They take a team approach so they can go deeper into financial planning with the goal of delivering highly customized client experiences and building meaningful relationships.

“We work with a diverse mix of clients from small business owners to healthcare workers to retirees, all who enjoy a personalized and collaborative relationship with their financial advisor,” Credo said. “Whether our clients seek financial stability, wealth accumulation or legacy planning, we strive to deliver the most efficient and effective roadmap to aid them on their financial journey.”

The team chose to move to LPL for many reasons, including increased office efficiencies, marketing resources, the ability to elevate the client experience and future growth.

“We’re no longer a one-man firm, and it’s our hope that we can be a 100-year-plus firm with a unique brand and culture,” Enriquez said. “By joining LPL, we have access to LPL’s integrated platform with single sign-on and self-clearing capabilities. We can use the planning software of our choice, which gives us the capability to upload tax returns within the same system.”

Additionally, Enriquez said they can now market their brand outside of a franchise system and build content more easily, ultimately allowing them to share more resources with their clients and community.

With the move to LPL, the team is hopeful to find more like-minded advisors to partner with and grow their footprint. They said LPL’s vast resources will help them elevate their value proposition as they seek other financial professionals who might benefit from working in a team environment.

“We extend a warm welcome to Arthur, James C., James E., Alexis and Leonardo,” said Scott Posner, LPL Executive Vice President, Business Development. “We serve to empower advisors, providing them with industry-leading tools, innovative capabilities and technology that streamline how they operate and reduce complexities. We provide support across the back, middle and front office, all while giving the team ultimate control in how they operate. We are deeply invested in our advisors, getting their input and working alongside them to be able to design solutions that meet their needs — so they can serve the needs of their clients. We look forward to supporting Strategic Insights Financial Planning for generations 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 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 #559076