LPL Financial Welcomes Legacy Retirement Planning

Apr 17, 2024

SAN DIEGO, April 17, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Phil Eggers of Legacy Retirement Planning has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $170 million in advisory, brokerage and retirement plan assets* and joins LPL from Raymond James.

Based in Plano, Texas, Eggers began his career as a financial advisor in 1990 and considers it an honor to manage the wealth for approximately 300 families. He works alongside of Operations Manager Matthew Ford, and they both firmly believe it's their responsibility to always put clients first in every decision.

The move to LPL helps set the tone for the next chapter for Legacy Retirement Planning.

"I was at LPL for 18 years previously and had a wonderful experience the first time. It feels like I'm coming back home," Eggers said. "LPL has significantly enhanced service experiences in recent years and created a more streamlined operating system within a next level platform that will benefit future generations. I really appreciate the growth of the company, the positive attitude of LPL's senior leaders and their mission to take care of advisors so we can take care of our clients."

Eggers said the move also creates an attractive value proposition for his business and better positions his team for business continuity as he prepares a succession plan for Ford to one day take over.

Outside of work, Eggers is a personal pilot who flies his own small plane for Angel Flight, a charitable organization that provides transport for those in need to receive medical treatment in distant cities.

Scott Posner, LPL Executive Vice President, Business Development, stated, "We welcome Phil and Matt to the LPL community. We are inspired by their foresight to develop a thoughtful business continuity plan that is guided by their commitment to their clients. As their partner, we are committed to delivering the differentiated capabilities, technology and service that help them be successful today and into the future as the needs of their clients and their business evolve. We look forward to long-term relationship with Legacy Retirement Planning."

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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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