LPL Financial

LPL Financial Welcomes Hickory Ridge Wealth Partners

Apr 25, 2024

SAN DIEGO , April 25, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Justin Souma, CFP®, AAMS®, has returned to LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $190 million in advisory, brokerage and retirement plan assets* and joins LPL from Benjamin F. Edwards & Co.

With the move, Souma launches Hickory Ridge Wealth Advisors, a new independent practice in Highlands, N.C., where he provides comprehensive investment planning and wealth management for individuals, multigenerational families, non-profits and corporations. He is supported by Client Services Associate Barbara Fish.

Souma has been in the financial services industry since 2004 and is passionate about educating clients and helping them on the path to financial independence. His services include advisory portfolios, financial planning, investment strategies, retirement planning and tax strategies. He firmly embraces the principle of putting his clients first and working with them in an atmosphere characterized by integrity and mutual respect.

Recognizing a need for a new wealth management partner, Souma interviewed several firms before choosing LPL as the best fit for his business.

"During the due diligence process, I was highly impressed by the changes that LPL has made in recent years, especially in terms of all the innovative technology to help make our business easier to operate and less restrictive," Souma said. "The online client portal and Account View offer a streamlined, user-friendly experience for my clients to keep track of all their information."

Souma is also impressed with LPL's Research professionals and resources that offer strategic market insights. By having access to this seasoned team, Souma says he will be able to serve clients "with the highest level of service and guidance."

Scott Posner, LPL Executive Vice President, Business Development, said, "We are proud to welcome Justin back to LPL and to support the launch of Hickory Ridge Wealth Advisors. We are honored Justin recognized we have the stability to serve as a long-term partner to his growing firm and clients. At LPL, we are deeply committed to our advisors' success and will continue to invest in capabilities designed to help them thrive."

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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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