LPL Financial Welcomes Strategic Wealth Partners

Apr 29, 2024

SAN DIEGO, April 29, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the advisors at Strategic Wealth Partners have joined LPL Financial's broker-dealer, RIA and custodial platforms. The team reported serving approximately $860 million in advisory, brokerage and retirement plan assets* and joins LPL from Lincoln Financial.

With 25 years of financial planning experience, Strategic Wealth Partners owner Ryan Rayburn, CFP®, occupied various leadership, recruitment and mentorship roles throughout his career before stepping back to work more closely with individuals and multi-generational families. He is joined by fellow advisor R.E. "Mike" Woodard III, CFP®, and a six-member office staff.

Based in Dallas, with an additional registered office in Minden, La., the Strategic Wealth Partners team offers personalized, in-depth financial planning and investment analysis. They take a holistic approach to wealth management and act as a quarterback for their clients' financial needs by working closely with CPAs and attorneys to provide a comprehensive financial picture.

After learning Lincoln would be acquired, Rayburn and team embarked on a due diligence quest that led them to LPL for the next chapter of their business.

"The north star of everything we do has always been for the client, and LPL emerged as the most seamless platform for our clients' future financial needs," Rayburn said. "I wanted to align with an organization that makes large investments in tools and technology and has a strong track record of supporting advisors. LPL's comprehensive suite of tools and resources were pivotal in our decision-making and will enable us to deliver differentiated services experiences that our clients expect."

Rayburn is eager to expand his team by welcoming new advisors, particularly those of a younger generation, and guiding them to become integral members of the practice. He believes LPL's scope and size creates a strong value proposition in his recruitment efforts.

Outside of work, the Strategic Wealth Partners team is passionate about giving back to local Dallas charities and strengthening the community by regularly supporting HopeKids and Jonathan's Place.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Ryan, Mike and their team to the LPL community and are proud they recognized us as the ideal partner for the future of their business. Advisors need robust resources to help differentiate the client experience and nurture a thriving business, and we believe our innovative capabilities are a key enabler for both. We look forward to supporting Strategic Wealth Partners for years to come as they evolve their business and help clients work toward financial security."

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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.

Securities and Advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor. Member FINRA/SIPC. LPL Financial and its affiliated companies provide financial services only from the United States. Strategic Wealth Partners and LPL Financial are separate entities. LPL Financial does not offer tax advice or tax related services.

Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

**Value approximated based on asset and holding details provided to LPL from end of year, 2023.*

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