LPL Financial Welcomes Journey Financial

May 1, 2024

SAN DIEGO, May 01, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Timothy J. Heisterkamp, CFP®, and Max Neese, CFP® have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $200 million in advisory, brokerage and retirement plan assets* and join LPL from Cambridge.

Heisterkamp, an advisor since 1998, built the Jefferson, Iowa-based practice from the ground up after an initial career as a high school economics teacher. Neese's entry into the financial services sector was inspired early on by Heisterkamp, who was a guest speaker at Neese's high school class to discuss the world of investing.

"I was captivated by the concept of the time value of money and how investing may help your wealth potentially grow over time," Neese said. "I left the class thinking, 'I want to do what that guy does.'"

In college, Neese shadowed Heisterkamp, and two years ago he joined the practice full time as Heisterkamp's succession plan. Together, along with support from Registered Assistant Kim Bendickson, they are dedicated to fostering lifelong partnerships with clients while serving as their financial confidants. They offer a broad spectrum of financial services ranging from education planning to comprehensive estate planning, empowering individuals and business owners to identify their goals and make informed decisions throughout each critical stage of life.

The decision to affiliate with LPL was driven by the team's desire for more office efficiencies and enhanced service capabilities.

"When we went down to LPL's headquarters in February for a demo, we were immediately impressed by the innovative technology and resources," Heisterkamp said. "We'll be able to work faster and more efficiently since everything is integrated into one system, including account opening paperwork."

"Our client base is highly active, and our office is a hub of constant activity," Neese emphasized. "We are committed to proactively caring for our clients, working toward providing unparalleled service and personalized experience that you wouldn't find anywhere else."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Tim and Max to LPL and look forward to supporting the next chapter of their journey. As a leader in the industry, our size and stability position us to be a long-term partner to our advisors. We are committed to continually investing in our advisors' businesses, ensuring they have access to the technology, products, platforms and innovative capabilities that can help them differentiate their practices and be successful business owners today and into the future."

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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. Journey Financial, LLC and LPL Financial are separate entities.

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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