LPL Financial Welcomes Guardian Partners Wealth Management

May 2, 2024

SAN DIEGO, May 02, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Mitchell “Mitch” and Wesley “Wes” McCann have joined LPL Financial’s broker-dealer, RIA and custodial platforms. They reported serving approximately $240 million in advisory, brokerage and retirement plan assets*, and join LPL from Ameriprise.

With the move, the father and son team launch Guardian Partners Wealth Management, an independent financial practice based in the Detroit suburb of Bloomfield Hills, Mich. Mitch, a 36-year veteran of the financial services industry, said the name was inspired by the team’s desire to protect their clients’ finances and help them achieve fiscal security through their retirement years. Wes joined his father about five years ago, and together with the help of office manager, Nicole Obarto, the team takes a holistic, education-driven approach to wealth management.

“Our firm is a bit different in the sense that all our clients are nearing or in retirement, and our focus is on helping them make the most of their money – whatever their goals might be,” Mitch said. “Getting to know our clients, their retirement aspirations and their understanding of the financial planning process is a big part of what we do. We really enjoy taking the time to sit down with each client to put together a comprehensive plan to help their money work for them throughout their golden years.”

Looking to elevate their clients’ experiences, along with their desire for more autonomy, the Guardian Partners Wealth Management team interviewed several firms before selecting LPL as the best fit for their business.

“Partnering with LPL means freedom, and that’s exactly what we were looking for,” Mitch said. “With LPL, we will be able to offer the solutions and products that make the most sense for our clients, allowing us to provide a next-level experience. And with LPL’s innovative offerings, like Admin Solutions and Marketing Solutions, we will be able to get the help we need to grow our business our way.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome Mitch, Wes and Nicole to the LPL community and are honored to support the launch of Guardian Partners Wealth Management. At LPL, we are committed to helping advisors visualize and develop their perfect practice by offering streamlined and integrated business solutions and personalized support to help them create an elevated experience for their clients. We look forward to supporting this team for years to come.”

Related

Advisors, find your perfect fit at LPL.

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 mid-2023.*

Connect with Us!

https://twitter.com/lpl

https://www.linkedin.com/company/lpl-financial https://www.facebook.com/LPLFinancialLLC

https://www.youtube.com/user/lplfinancialllc

Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840
Tracking #572350