LPL Financial Welcomes Generational Asset Planning

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SAN DIEGO, June 04, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Tre Panagos has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $265 million in advisory, brokerage and retirement plan assets* and joins LPL from Edward Jones.

Panagos began his career in broadcast journalism and spent several years as a news videographer and director until the long hours and excess travel took a toll on his family. In 2011, he chose to team up with his father in financial services, and he eventually took over the practice after his father's retirement. Today, one of the Panagos' daughters is joining his firm while the other daughter is planning to be a valuable business partner in the future.

Based in Santa Fe, N.M., Panagos works with attorneys, accountants and other professionals to deliver comprehensive investment strategies that take into consideration all aspects of each client's financial life.

"We specialize in generational wealth, not only helping clients accumulate wealth but also helping them transfer that wealth to future generations," Panagos said. "So much focus is placed on building wealth, which is important, but the next step—what to do with that wealth—is often overlooked. We've been fortunate to work with four generations of clients, and now with my daughter on board, we are walking the walk as we talk about multigenerational planning."

With the move to LPL, Panagos launches Generational Asset Planning. He looks forward to being able to operate independently and build out his ideal, multigenerational practice.

"To be successful in this business, you must put the needs of your clients ahead of your own and operate with strong morals and ethics," Panagos said. "LPL's culture of independence gives me the freedom to operate in the best interests of my clients, which is paramount. I also appreciate the integrated technology LPL provides, both for advisors and clients, and I'm particularly impressed with how straightforward and intuitive the account statements are. I want them to have the best possible experience, and LPL represents the practice of the future."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Tre and his family to the LPL community as they build out a multigenerational practice. We look forward to supporting the entire team at Generational Asset Planning, providing them with innovative technology and resources designed to help deliver exceptional client experiences."

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About LPL Financial
LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that the firm should work for advisors and institutions, and not the other way around. Today, LPL is a leader in the markets we serve, serving nearly 23,000 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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