LPL Financial Welcomes Lifetime Legacy Wealth Solutions

Jun 10, 2024

SAN DIEGO, June 10, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA) announced today that financial advisor David Hilbig, CFP®, has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $275 million in advisory, brokerage and retirement plan assets* and joins LPL from Corebridge Financial, formerly Valic, a subsidiary of AIG.

Hilbig, who lives in The Woodlands, Texas area and maintains a registered office in Mundelein, Ill., has more than 20 years of experience crafting personalized financial strategies tailored to each client's unique needs and aspirations. He takes a holistic approach to financial planning, encompassing areas such as wealth management, retirement planning, investment advisory and risk management. By carefully assessing a client's financial situation and priorities, he strives to provide comprehensive solutions that align with their short-term objectives and long-term visions.

With the move to LPL, he launches Lifetime Legacy Wealth Solutions. The new name reflects the type of work he does to help clients prepare their financial wellbeing for their full lives and future generations.

“Throughout my career, I've made it a priority to cultivate long-lasting relationships with clients built on trust, integrity and transparency,” he said. “I focus on ongoing financial education and open communication to help clients feel empowered and informed along each step of their financial journey, whether that's navigating major life transitions, growing their wealth or planning for retirement.”

Hilbig said it is of utmost importance to act as a fiduciary and put clients' needs first. That commitment led him to LPL.

“It was important for me to be with a firm that allows me to act an as independent advisor for my clients,” Hilbig said, “At LPL I can truly put my clients' interests first because I have the ability to look for the best rates and products to fit their needs. LPL's size and scale, combined with its sophisticated business resources and integrated technology, will enable me to provide my clients with an even higher level of service and support. I didn't make this move for me. I did it because it was the right thing for my clients.”

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome David to LPL and congratulate him on the launch of Lifetime Legacy Wealth Solutions. We recognize what it takes to launch and operate a thriving business and are committed to investing in streamlined and integrated business solutions designed to help advisors spend more time with their clients and differentiate their practices. Our team looks forward to supporting Lifetime Legacy Wealth Solutions for years to come.”

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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 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.

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. Lifetime Legacy Wealth Solutions 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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