LPL Financial

Financial Advisor Danielle Qualls Joins LPL Financial and Women-led Bergkamp Financial

Jun 25, 2024

SAN DIEGO, June 25, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Danielle Qualls has joined LPL Financial's broker-dealer, RIA and custodial platforms, teaming up with existing firm Bergkamp Financial. She reported having served approximately $160 million in advisory, brokerage and retirement plan assets* and joins LPL from Stifel, Nicolaus and Co.

A Kansas native, Qualls started her career in corporate accounting before making the switch to wealth management in 1999. She focuses on connecting with clients at a multigenerational level to develop financial strategies aimed at building family legacies. Looking to extend that collaborative approach to a team setting while enjoying the benefits of independence, Qualls turned to LPL to help find an established practice that fit her goals, clients and personality. This led her straight to women-led Bergkamp Financial.

"I wanted to provide more services and go farther," Qualls said. "I knew that I'd need to work with a team that had different experiences and specialties. With LPL and Bergkamp Financial, there is opportunity to collaborate by teaming up on what works best for clients."

Led by Managing Partners Amy McKinley and Lori Zern, Bergkamp Financial serves a wide range of clients, focusing on comprehensive wealth strategies, planning for retirement, investments, life insurance, annuities and long-term care insurance. The practice also includes financial advisors Ryan Zern and Sam Milner, and advisor assistant Katherine Reif.

Bergkamp Financial has been with LPL since 2021. The Bergkamp team said they appreciate how LPL's open architecture platform, robust research capabilities — including the weekly commentary — and insurance product offerings have enhanced their ability to produce strategies that address the unique needs of their broad client base and drive the practice forward.

According to Zern, adding Qualls to the team made sense for the next phase of their growth. "Danielle has the skills and knowledge that we need to build out our services for the benefit of our clients. She shares the same strong work ethic, empathy and compassion, making her the right addition."

McKinley added, "We have a wide client base, from farmers to teachers to business owners, and we'll continue to build on our rural grassroots business as we go. With Danielle joining us, we are looking forward to enhancing our services as a whole and joining our efforts for more holistic planning. We're very excited for the future."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Danielle to LPL Financial. At LPL, we are committed to providing independent advisors with robust, integrated capabilities and a comprehensive suite of tools and resources designed to support their unique business goals. We look forward to seeing Bergkamp Financial continue to grow, expand their services and deliver exceptional value to their clients."

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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.

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.

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

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