Father-daughter advisors join LPL Financial to launch Countiss Wealth Management

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SAN DIEGO, July 08, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that father and daughter financial advisors Dan Countiss and Olivia Countiss CEPA, AAMS, have joined LPL Financial's broker-dealer, RIA and custodial platforms to launch a new independent practice, Countiss Wealth Management. They reported serving approximately $200 million in advisory, brokerage and retirement plan assets* and join LPL from Edward Jones.

Based in Flowood, Miss., the advisors have nearly 25 years of combined experience in wealth management, financial planning and investing. Dan Countiss is a U.S. Army veteran who became a financial advisor after owning a successful business and selling it, making him an ideal fit for business owner clients. Olivia Countiss, who took an interest in investing and financial planning at a very young age, joined the industry as an admin during college and spent time in the home office of her former firm prior to starting her own practice in 2019.

By going independent, they can now work together as a team to take more comprehensive care of their clients. They are joined by Investment Analyst Chandler Duke and Client Services Associate Christy Walker.

"By forming Countiss Wealth Management, we can create a new practice that allows us to work together in serving clients long into the future," Dan Countiss said. "We see ourselves as now being a multigenerational family serving multigenerational families. By working with and beside Olivia, we can deliver more expertise together to our clients."

The team turned to LPL for improved financial planning services, greater investment flexibility and enhanced technology that makes it easier for clients to access their account information and financial plans. The integrated capabilities will also help the advisors be more efficient, freeing up time to spend with clients instead of on administrative tasks. They also appreciate that they can now provide guidance on 401(k) investments.

"With 401(k)s often being the first vehicle for retirement savings, clients have been asking for recommendations on how to invest their 401(k) dollars. Countiss Wealth Management will now be able to help clients with this important part of their financial picture," Olivia Countiss said. "We always want to be in the best place possible to service our clients and their families, and this move to LPL is a wonderful change for the clients who choose us."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Dan, Olivia and their team to the LPL community and congratulate them on the launch of Countiss Wealth Management. Giving advisors what they need to advance their business on their terms is one of LPL's mission-critical objectives. We are committed to delivering value by making ongoing investments in new capabilities and innovative solutions designed to help advisors design their perfect practices and optimize their success."

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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.

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

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