LPL Financial Welcomes Stable Wealth

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SAN DIEGO, July 18, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Alex Williams, CFP®, has joined LPL Financial's broker-dealer, RIA and custodial platforms to launch a new independent practice, Stable Wealth. He reported serving approximately $170 million in advisory, brokerage and retirement plan assets* and joins LPL from Edward Jones.

Based in Olympia, Wash., Williams is a 25-year veteran of the financial services industry and past regional leader who enjoys putting the investment strategies and comprehensive financial plans in place to help clients take more control of their financial journey. He works primarily with retirees and clients in the equestrian community, where his wife, Jennifer, has won numerous accolades and a National Championship in dressage at the highest Grand Prix level.

In going independent, Williams founded Stable Wealth to create differentiated experiences for clients as they work toward their best retirement. He is joined by registered administrative assistant Cindi Mitchell.

"Moving to LPL was a strategic decision driven by my desire for greater flexibility and the freedom to better serve clients," Williams said. "I have a commitment to adapt to this ever-changing financial landscape. As client expectations continuously evolve, it became clear that I needed a partnership that could support their increased needs. I can now offer more holistic planning, which includes advanced tax and estate planning, as well as alternative investment opportunities."

Williams noted the decision to move to LPL was not made lightly. He researched many firms and other opportunities before deciding that LPL's depth of planning tools and business resources would help him be more hands-on in his approach to helping clients manage their portfolios in a scalable way. He also receives dedicated localized support from Financial Advocates, an existing firm that offers concierge-level services to independent advisors in the Pacific Northwest.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Alex and Cindi to the LPL community and congratulate Financial Advocates on growing its advisor network. At LPL, we are deeply committed to giving advisors ultimate choice and flexibility in how they build their ideal practice. We offer a wide range of innovative solutions and integrated capabilities to help advisors grow and be successful in serving the diverse needs of their clients. We congratulate Alex on the move to independence and look forward to supporting Stable Wealth 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.

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

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