LPL Financial

# LPL Financial Welcomes Englert Financial

Jul 31, 2024

SAN DIEGO, July 31, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq:LPLA) announced today that financial advisors George Englert, Kevin Englert and Carrie Hughes have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported serving approximately $170 million in advisory, brokerage and retirement plan assets* and join LPL from Avantax, now owned by Cetera.

Based in Springfield, Va., Englert Financial is a family-oriented firm founded by George Englert, an industry veteran who has worked closely with various government agencies, including the Federal Reserve Board, the Office of the Comptroller of the Currency and the Federal Deposit Insurance Corporation. His son, Kevin Englert, joined the team in 2011 after an initial career as an auditor in public accounting and the private industry. Carrie Hughes joined the firm in 2016, bringing a diverse background in wealth management, accounting, insurance, business analysis and project management.

"We believe our clients deserve the highest level of service, which is why we take a team approach to add a broader perspective to all we do. Our goal is to provide a variety of comprehensive financial planning services and investment strategies with the understanding that each client is unique and deserves personalized attention and tailored services," George Englert said.

The move to LPL is part of Englert Financial's strategic plan and ongoing commitment to provide clients with enhanced technology and more personalized services.

"We chose LPL for its best-in-class technology and innovative resources, which allows us to elevate our service and provide clients with more hands-on experiences with their accounts," Carrie Hughes expressed. "With LPL's integrated capabilities, our team will be able to save time and truly focus on what's most important, which is personalized investment planning and building wealth for our clients."

Kevin Englert added, "We're also very excited about the opportunity to grow our team and evolve our business. As a Fortune 500 company, LPL offers the stability and confidence we need to build out our ideal practice of the future."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome George, Kevin and Carrie to LPL and look forward to supporting their firm's continued growth and success. LPL is committed to delivering independent solutions designed to meet the needs of advisors wherever they are in the evolution of their practice. Our integrated capabilities and strategic business resources allow them to offer seamless and personalized experiences to create more value for clients and win in their market."

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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 more than 23,000 financial advisors, including advisors at approximately 1,000 institutions and at approximately 580 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. Englert Financial 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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