LPL Financial Welcomes Eight Financial Advisors in Florida

Oct 16, 2024

SAN DIEGO, Oct. 16, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that a group of advisors in St. Petersburg, Fla., have joined LPL Financial's broker-dealer, RIA and custodial platforms. They reported having served approximately $450 million in advisory and brokerage assets* and join LPL from Raymond James.

Financial advisors Michael Collins, Jim Spicer, Ryan Roy, Gary Hummel, Robert Torris, David Zaccagnino, Steven Laesser and Mark Wolf, along with his son Logan Wolf, a registered assistant, operate independently while leveraging shared office space, best practices and approaches to client services. They offer a comprehensive suite of financial services that spans portfolio management, retirement income, tax planning, education funding, estate planning and more.

The transition to LPL was motivated by a desire to better serve their clients and to gain more control over their future. The advisors said LPL's flexible platform and customizable solutions were key factors in their decision to move.

"We were seeking a partner that could help us elevate our service offering so we can continue to give clients what they need and deserve," said Collins, who previously served as branch manager. "With LPL, we have access to a wide range of innovative capabilities and strategic resources, along with an expanded suite of products that will greatly enhance client experiences. We are now empowered to decide what tools we want to use without corporate influence or mandates. This move will be a positive change that will help position us for long-term sustainability and growth."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Mike, Jim, Ryan, Gary, Mark, Logan, Robert, David and Steven to the LPL community and congratulate them on the next chapter of their business. As a committed partner, LPL will provide powerful capabilities, innovative technology and robust business solutions to help increase efficiency and create even better client experiences. We look forward to supporting this group for years to come."

Related

Advisors, learn how LPL Financial can help take your business to the next level.

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 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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