LPL Financial

LPL Financial Welcomes Goodwin Petrilli Financial

Oct 29, 2024

SAN DIEGO, Oct. 29, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Randy Petrilli, Matt Goodwin, Travis Whitaker and Jeff McWhorter of Goodwin Petrilli Financial have joined LPL Financial's broker-dealer, RIA and custodial platforms. The advisors reported having approximately $205 million in advisory, brokerage and retirement plan assets*. They join LPL from Cambridge Investment Research.

Based in Fort Collins, Co., the firm was founded in 1992 by Harry Goodwin, Matt's father, who retired last year after serving clients for more than three decades. The ensemble practice offers a comprehensive range of financial planning and investment management services to individuals, families and businesses throughout Northern Colorado.

"We have a strong local presence and have built our business through a solid referral network," Goodwin said. "The team has a long history of working with educators in northern Colorado by helping them manage retirement assets and plan for retirement. Over the years, we've worked with multiple generations of clients who want to preserve their family legacies."

As client expectations continue to rise, the team at Goodwin Petrilli Financial turned to LPL for the next chapter of their business.

"We were highly impressed by LPL's technology, which allows us to provide more personalized and efficient services," Petrilli said. "Our clients benefit by having one place where they can find all their account information, and we appreciate how programs work together in ClientWorks to manage our daily tasks — from meeting minutes to planning software. We are excited about LPL's commitment to providing us with the resources and support we need to grow our business and deliver more value to clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "On behalf of the entire LPL community, I'd like to extend a warm welcome to Randy, Matt, Travis and Jeff. We are committed to delivering innovative technology, robust resources and strategic support to enable advisors to provide personalized advice and run thriving practices. We look forward to supporting the entire team at Goodwin Petrilli Financial 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 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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