LPL Financial

LPL Financial Welcomes Financial Advisors Ryan Kirby, Michael Alvarez

Nov 13, 2024

SAN DIEGO, Nov. 13, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that financial advisors Ryan Kirby, CFP®, and Michael Alvarez have joined LPL Financial's broker-dealer, RIA and custodial platforms, aligned with existing firm Seapoint Wealth Advisors (Seapoint). Kirby and Alvarez reported serving approximately $540 million in advisory, brokerage and retirement plan assets,* and they join LPL from U.S. Bank.

Based in San Diego, Kirby and Alvarez are longtime colleagues who built their practices on the foundation of personal connections and a commitment to making a positive impact in the lives of their clients. With Kirby serving as a mentor to Alvarez early on, they now embark on the journey to independence as business partners with a shared vision and aspiration for the future.

"After a long career of learning and growing, we decided independence was the best way for us to deliver advice and enhance services for our clients," Kirby said. "As a business owner with the freedom to operate on my own terms, I look forward to offering a more common-sense approach to client relationships and placing their best interest first. With the robust support from LPL's innovative platform, combined with the collective group of like-minded financial professionals at Seapoint, Michael and I believe this move will help us in our pursuit of excellence in client service."

Joining an existing LPL Strategic Wealth Services team

Kirby and Alvarez turned to one of LPL's supported independence solutions, LPL Strategic Wealth Services (SW), which combines the freedom and flexibility of entrepreneurship with hands-on business services to help practices thrive, both operationally and strategically. Seapoint is an existing SW team that receives ongoing operations support managed by experienced professionals including a business strategist, marketing partner, CFO and administrative assistant.

"We're independent financial advisors joining Seapoint as a thought collective. We are excited to become part of a community of advisors who share our commitment to excellence," Alvarez said. "Over the years, investment advice has become commoditized, so it's crucial that we provide customized strategies within an open architecture environment. With LPL's flexible platform, everything from the client experience to portfolio management to financial planning can help us differentiate ourselves and provide greater focus and personalization for our clients."

With the move to LPL, Kirby and Alvarez have become managing directors at Seapoint Wealth Advisors. They will open a new office in downtown San Diego while tapping into the resources provided under the Seapoint umbrella. They are supported by sales associate Leon Aceituno.

Chad Taylor, president of Seapoint Wealth Advisors, stated, "We're excited to continue growing the Seapoint team with the addition of Ryan and Michael. Their commitment to putting clients first and their focus on building personal relationships make them a great fit for our firm. We look forward to supporting them as they create elevated experiences for clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Ryan and Michael to the LPL community and congratulate them on taking the next step in the evolution of their practice. Congratulations also to Chad and the Seapoint team on their continued growth. Advisors within our supported independence offering receive tailored experiences, along with access to robust technology and dedicated resources designed to help them deliver great advice and run thriving businesses. We look forward to a long and successful journey ahead with Seapoint Wealth Advisors."

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.

Wealth Advisors and LPL 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.*

Media Contact:
Media.relations@LPLFinancial.com
(704) 996-1840

Tracking #656536