LPL Financial

LPL Financial Welcomes Argosy Financial

Dec 3, 2024

SAN DIEGO, Dec. 03, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC, announced today that financial advisor James P. Norris, MBA, APMA®, of Argosy Financial has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported serving approximately $250 million in advisory, brokerage and retirement plan assets* and joins LPL from Centaurus Financial.

Based in Glendale, Ariz., Norris has more than 20 years of experience in financial services, specializing in investment management, client portfolio construction and retirement planning. He prides himself on developing personalized investment strategies for each client's distinct needs, rather than using a templated approach.

With support from team members Michael O'Brien, Romy Quick and Sarah Norris, Argosy Financial is committed to providing clients with the highest level of service, operating with three values at top of mind: honesty, integrity and trust. "Without honesty, we cannot advise; without integrity we cannot put clients' needs first; and without trust, we cannot survive," Norris said.

Norris was a longtime LPL advisor in the past who left to become a successor for two retiring advisors. As his business continued to grow, Norris felt it was the ideal time to return to his roots and take advantage of LPL's industry-leading capabilities.

"We are thrilled to be joining LPL Financial — in many ways, it feels like coming home," Norris said. "LPL's robust technology and resources will enable us to provide our clients with the best possible service and strategies. We appreciate all the customizable options and flexibility within the digital platform. We also expect considerable time savings that we can invest back into taking care of our clients."

Scott Posner, LPL Executive Vice President, Business Development, said, "We extend a warm welcome to James and his team. It is great to have him back in the LPL community. As the industry continues to evolve at an accelerated pace, we remain steadfast in our commitment to deliver innovative capabilities and strategic resources designed to help advisors run thriving practices and bring added value to their clients. We look forward to supporting Argosy Financial for years to come."

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About LPL Financial

LPL Financial Holdings Inc. (Nasdaq: LPLA) is among the fastest growing wealth management firms in the U.S. As a leader in the financial advisor-mediated marketplace, LPL supports more than 28,000 financial advisors and the wealth management practices of 1,000 financial institutions, servicing and custodying approximately $1.6 trillion in brokerage and advisory assets on behalf of 8 million Americans. The firm provides a wide range of advisor affiliation models, investment solutions, fintech tools and practice management services, ensuring that advisors and institutions have the flexibility to choose the business model, services, and technology resources they need to run thriving businesses. For further information about LPL, please visit www.lpl.com.

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

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