LPL Financial Welcomes Frontline Investment Advisors

Dec 4, 2024

SAN DIEGO, Dec. 04, 2024 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Amanda Miller, Devin Richard and Jonathan Vila, CRPC®, of Frontline Investment Advisors have joined LPL Financial's broker-dealer, aligned with existing firm GradePoint Financial. They reported having served approximately $550 million in advisory, brokerage and retirement plan assets* and join LPL from VALIC Financial Advisors, the broker-dealer for AIG Retirement Services.

Based in Tampa, Fla., Miller, Richard and Vila collectively have approximately 50 years of extensive experience providing comprehensive investment advice to school employees, sheriff's office personnel and those in the medical field, all frontline workers who serve their community.

"Our mission is to serve those who serve others," Richard said. "As a team, we've been in the trenches and on the frontline with clients helping them not only start their financial planning journey but navigating the waters when circumstances change and markets become volatile, as clients ultimately need guidance to make the best decisions for their individual situations."

The advisors, who are joined by two assistants, specialize in the intrinsic details of the Florida Retirement System, Deferred Retirement Option Program and in the healthcare 403(b) plans market. While each advisor manages their own client base, they enjoy working in a collaborative environment where they can share best practices and resources to maximize the client experience.

The move to LPL followed an extensive search to find a new wealth management firm that would help the advisors propel the next phases of their business.

"After carefully evaluating our options, it was clear to us that the best choice for our clients was to reshape our business and invest in the future," Richard said. "We found that LPL is closely aligned with our vision of continued growth and service for our clients. As independent advisors, we look forward to being able to offer a wider array of investment strategies, more efficient processing, enhanced technology and an improved client experience. We look forward to collaborating with LPL and leveraging their extensive support to drive our business forward."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Amanda, Devin and Jonathan to the LPL community and congratulate GradePoint on its continued growth. LPL is committed to providing unprecedented choice and flexibility in how advisors build their practices, along with integrated capabilities and robust business solutions designed to help them work smarter and deliver more value to clients. We look forward to supporting the continued success of the entire team at Frontline Investment Advisors 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 approximately 1,200 financial institutions, servicing and custodying approximately $1.7 trillion in brokerage and advisory assets on behalf of 6 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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