LPL Financial

LPL Welcomes Legacy Premier Wealth Management

Mar 18, 2025

SAN DIEGO, March 18, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisors Larry Hubbard, APMA™, Craig Conner, CFP®, APMA™, ChFC®, BFA™, and Jade Maasch, CFP®, BFA™, APMA™, have joined LPL Financia broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. They reported serving approximately $275 million in advisory, brokerage and retirement plan assets* and join LPL from Ameriprise.

The advisors are longtime colleagues who teamed up to create a full-service wealth management firm dedicated to helping motivated clients understand their entire financial picture. Formerly Alliance Financial Partners, the team has rebranded as Legacy Premier Wealth Management with the move to LPL. They are based out of Greeley, Colo., and Cheyenne, Wyo., and are supported by Chief Operating Officer Rob Timme.

“We’re passionate about helping create a lasting legacy for our clients and their families,” Hubbard said. “Our mission is to educate and empower our clients, helping them navigate financial decisions with confidence.”

As the team continued to evolve, the advisors sought a new firm that would best support their vision for the future. Their due diligence process led them to LPL.

“By making this move, we have the flexibility to grow the practice in a way that will be seamless and non-disruptive for clients and our staff,” Hubbard said. “LPL does not offer proprietary investment products, which allows us to provide the products and services our clients need. Additionally, we appreciate LPL’s size and scale, along with its integrated, open architecture platform where we can access everything we need with a single sign-on.”

The team is committed to building long-term relationships with both clients and their communities. They actively volunteer with United Way of Weld County, Kiwanis, Muley Fanatic Foundation, Michael Ray Lee Foundation, Rocky Mountain Elk Foundation and American Cancer Society.

Scott Posner, LPL Executive Vice President, Business Development, said, “We welcome Larry, Craig and Jade to the LPL community and congratulate them on the launch of Legacy Premier Wealth Management. Advisors who join LPL have access to dedicated support teams and integrated capabilities that allow them to run high-performing practices, maintain operational efficiency and focus on their clients. We look forward to supporting the entire Legacy team 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 nearly 29,000 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 approximately 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 as reported to LPL

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