



## LPL Financial Welcomes Trimp Wealth Management

Apr 9, 2025

SAN DIEGO, April 09, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that father and son financial advisors Patrick Trimp, CFP®, and Jack Trimp, ChFC®, of [Trimp Wealth Management](#) have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. They reported serving approximately \$220 million in advisory, brokerage and retirement plan assets\* and join LPL from Nations Financial Group, Inc.

Based in Idaho Falls, Idaho, Patrick transitioned to the wealth management industry in 1999 after a decade of service in the U.S. Navy, during which he completed nuclear power training and was assigned to the USS Hammerhead, a fast-attack submarine. It was during his time in the Navy that Patrick was inspired to pivot his career, marrying his background in math with the intrigue of financial strategy.

In 2008, he launched Trimp Wealth Management with the goal of helping his clients achieve their financial objectives through education, strategic planning and a commitment to their success. Jack joined his father's practice in 2019, and together, they take a client-centered approach to helping their clients build sound financial futures.

"Being able to add value for my clients' financial wellness is the best part of the job," Patrick said. "We're here to guide our clients in making smart and strategic decisions about their finances and help them pursue their goals. We get to know our clients on a deeply personal level, and we are proud that most of our clients come to us through referrals."

It was the pair's desire to provide a more elevated and streamlined client experience that led them to LPL Financial.

"We spent more than three years looking for a new partner, so you could say we really did our due diligence. In the end, the decision to partner with LPL was the obvious choice," Jack said. "What really stood out to us was LPL's integrated and open architecture platform where we can access everything with a single sign-on as well as their ongoing commitment to meeting the evolving needs of advisors. We are confident that making the move to LPL is the right decision for our business and our clients."

The Trimps are active in their community and believe strongly in the importance of volunteering. Patrick is an active member in his church and Jack served as a missionary to South Africa, Uganda and South Sudan, working in refugee camps with Youth With A Mission (YWAM), a non-profit Christian organization.

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Patrick and Jack to the LPL community and wish them success with this next chapter of their business. As their partner, we are committed to delivering innovative technology, integrated platforms and strategic resources to help them seamlessly run their practice and provide an elevated client experience. We look forward to supporting Trimp Wealth Management for years to come."

### **Related**

Advisors, learn how LPL Financial can help [take your business to the next level](#).

### **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 custodialing 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](http://www.lpl.com).

**Securities and advisory services offered through LPL Financial LLC ("LPL Financial"), a registered investment advisor and broker-dealer, member FINRA/SIPC.** Trimp Wealth Management and LPL Financial 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, 2024.*

### **Media Contact:**

[Media.relations@LPLFinancial.com](mailto:Media.relations@LPLFinancial.com)

Tracking #714926