LPL Financial

LPL Financial Welcomes Tenacity Investment Group

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SAN DIEGO, April 15, 2025 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that financial advisor Steve Jones of Tenacity Investment Group has joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. He reported serving approximately $230 million in advisory, brokerage and retirement plan assets* and joins LPL from Raymond James.

Based in Longmont, Colo., Jones, a 25-year industry veteran, founded Tenacity Investment Group in 2010 with the goal of offering his clients independent advice and a fiscal education that helps them better understand the complexities of their financial lives. He is supported by long-time operations manager Mindy Kennie, and together they manage their client base of individuals in or nearing retirement and their families.

"Many of my initial meetings are three to four hours long because I truly believe in providing my clients with an understanding of the wealth management process and getting a clear picture of their financial goals," Jones said. "Once I understand their near-and long-term goals, I work with them to create sound financial plans, employ responsible investment strategies, stay unwaveringly focused on their goals and make adjustments based on reason and necessity."

Looking to create an enhanced experience for his clients, Jones turned to LPL Financial.

"LPL impressed me from the start for several reasons, including their dedicated team of service advisors and overall size and scale," Jones said. "But the biggest factor in choosing LPL is that they really understand and cater to independent advisors. With their service and support alongside their streamlined technology, I am confident this will help us provide a next-level client experience."

LPL Executive Vice President, Business Development Scott Posner said, "We welcome Steve and Mindy to the LPL community and are honored they turned to us to help elevate their practice. At LPL, we are deeply committed to helping businesses like Tenacity Investment Group by investing in robust, integrated technology capabilities designed to help advisors provide clients with differentiated experiences. We look forward to supporting Tenacity Investment Group 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 based on asset and holding details provided to LPL from end of year, 2024.*

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