



## LPL Financial Welcomes Waznik Heike Group

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SAN DIEGO, July 15, 2025 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that the team of 11 financial advisors from [Waznik Heike Group](#) have joined LPL Financial's broker-dealer, Registered Investment Advisor (RIA) and custodial platforms. They reported serving approximately \$750 million in advisory, brokerage and retirement plan assets\* and join LPL from Osaic.

Headquartered in Menomonie, Wis., with additional offices in Durand, Superior, Eau Claire and Rice Lake, the firm is led by partners Brad Waznik and John Heike, CFP®, ChFC®, CLU®, CASL®, CAP®, RICP®, who worked together for years before teaming back up in 2024 to form their own practice. Together, the team, who have more than 100 years of combined industry experience, takes a strategic, personalized and proactive approach to wealth management using experienced advice and tailored strategies to help guide their clients towards a more secure fiscal future.

"My favorite part of this job is connecting with our clients in a meaningful and purposeful way," Heike said. "Many of our clients are nearing or in retirement, and they have questions about how to be financially responsible while making the most of their golden years. It's our role to help them answer their questions, make decisions and help take that stress off their shoulders."

Looking to enhance their offerings and provide an elevated client experience, the Waznik Heike Group team, which includes Gene Larock, Steve Helling, Kyle Thorpe, Jon Storing, Tyler Schroyer, ChFC®, Coltin Brehm, Jerry Hagman, Bryan LaVoy and Sam Ferch, along with their support staff, turned to LPL.

"We were looking for a partner that was committed to helping us provide a next-level client experience, and we found that partner with LPL," Waznik said. "From their robust and integrated technology to their back-office support, LPL is committed to helping us serve our clients better. Plus, LPL is self-clearing, which is a bonus. LPL is a leader in this industry, and we are confident that this partnership is the right choice for our business and our clients."

Scott Posner, LPL Managing Director, Business Development, said, "We welcome Brad, John and their team to the LPL community. Just as the Waznik Heike Group walks in lockstep with their clients to help them build lasting financial confidence, we are committed to helping our advisors differentiate themselves and enhance their client experience. We look forward to supporting the Waznik Heike 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 custodizing approximately \$1.8 trillion in brokerage and advisory assets on behalf of approximately 7 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.** Waznik Heike Group 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.*

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