LPL Financial

For Immediate Release

LPL FINANCIAL WELCOMES LEVY, DANIEL AND MCGEE WEALTH MANAGEMENT

CHARLOTTE, N.C. – Nov.14, 2018 – LPL Financial LLC, a leading retail investment advisory firm and independent broker-dealer, today announced that Levy, Daniel and McGee Wealth Management, LLC has joined LPL's broker-dealer and corporate registered investment advisor (RIA) platforms. The firm reported that it served approximately $200 million of client brokerage and advisory assets*. Levy, Daniel and McGee Wealth Management joins LPL from Wells Fargo Financial Network.

Based in Lodi, Calif., the firm was founded in 2012 by partners Kenneth Levy, Corey N. Daniel, and Dudley McGee. The advisors help build, manage, preserve and transition wealth for business owners, farmers, high-net-worth families and investors at or near retirement. "We take a team approach to serving our clients, offering financial advice and planning as well as counseling on insurance solutions and long-term services," McGee said. "By sharing in the support of our clients, we are able to enhance the service we provide they receive and can add increased value by addressing clients' broad range of financial needs."

McGee said of their move to LPL: "We chose LPL for their service and support and because we wanted an independent partner that gives us the choice and freedom to serve our clients' best interests, which is fundamental to our business model. We were also impressed with LPL's technology and robust lineup of products and resources. We want to bring on additional advisors to grow our practice, and LPL is the right partner to support our goals."

"We welcome the Levy, Daniel and McGee team to the LPL family," said Rich Steinmeier, LPL Financial managing director and divisional president, Business Development. "LPL is committed to the independent model and to providing choice to help advisors earn trust and build long-term relationships with clients that create successful practices. Our ongoing investments in the resources, technology and innovative solutions help advisors differentiate their practices and win in their markets. We are proud to serve as their partner for growth."

Read about other firms that recently joined LPL in the News and Media section of LPL.com.

About LPL Financial

LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer**. We serve independent financial advisors and financial institutions, providing the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions.
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Securities and Advisory Services offered through LPL Financial. A registered investment advisor, Member FINRA/SIPC.

*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets have not been independently and fully verified by LPL Financial.

**Based on total revenues, *Financial Planning* magazine June 1996-2018

LPL Financial and that Levy, Daniel and McGee Wealth Management, LLC are separate entities.

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Connect with Us!

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