For immediate release
Contact: Sue Dobbe-Leahy
Dobbe Marketing & PR, Inc.
sue@dobbemarketing.com
815-236-2550

PROFESSIONAL WEALTH ADVISORS AND HIGHPOINT PLANNING PARTNERS ANNOUNCE MERGER OF 200 ADVISORS

(Downers Grove, IL) Professional Wealth Advisors, LLC (PWA), an independent wealth management firm and HighPoint Planning Partners, LLC, an independent registered investment advisor (RIA) announced a game-changing merger agreement to become one of the largest RIA hybrid platforms in the industry. Together, they will manage over $8.5 billion in total client assets and support more than 200 financial advisors.

The merger enhances both HighPoint Planning Partners and PWA's ongoing dedication to support the dramatic departure of financial advisors from large wire houses and banks to independence.

According to PWA Managing Partner Josh Gerry, "The HighPoint merger significantly ramps up our capability for advisor transitions and expands client options to more offerings and more services. Our platform is comprehensive and enables us to act as a full family office for every client. We offer turnkey financial resources for financial planning, investments, legal, insurance, and tax services. All in-house, which adds appreciable value for both the client and the advisor."

Craig Ibrahim, Managing Partner & Principal at HighPoint Planning Partners explained, "HighPoint has existed as an RIA and OSJ (Office of Supervisory Jurisdiction) of LPL primarily catering to independent advisors looking for local compliance, service, support and favorable business economics. This merger is a tremendous opportunity to share our strengths with PWA while supporting more advisors."

In addition, this alliance provides a battle tested and innovative succession and acquisition model for advisors who are planning to retire now or in the future.

Professional Wealth Advisors was founded in 2015 by three partners seeking to structure a financial services platform to make independence for advisors more gratifying. PWA provides support in navigating the challenges, regulatory pressures, technology, and infrastructure necessary to provide high quality service to clients and families.

HighPoint Planning Partners offers a wide range of back office support and supervision for Financial Advisors and their staff. When an advisor decides to go independent, HighPoint is there every step of the way to ensure a smooth transition to independence.

LPL Financial provides security and advisory services for both entities. LPL is a leader in the retail financial advice market and the nation's largest independent broker-dealer, as reported by Financial Planning magazine, June 1996-2019, based on total revenue. LPL provides independent financial advisors, professionals, and institutions, with the technology, research, clearing and compliance services, and practice management program needed to create and grow thriving practices.

Disclosure to add to the release:

Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.

For more information contact:
Josh Gerry, Managing Partner/ Professional Wealth Advisors, LLC
https://www.professionalwealthadvisors.com
Josh.Gerry@pwaplan.com
630-716-3600
2655 Warrenville Road, Suite 110
Downers Grove, IL 60515 Additional offices: Des Plaines, Crystal Lake

Craig Ibrahim, Managing Partner & Principal, HighPoint Planning Partners, LLC
https://highpointplanningpartners.com
craig.ibrahim@hiptpartners.com
630-495-9377
2001 Butterfield Road, Suite 1000
Downers Grove, IL 60515 Additional offices: Bloomingdale, Chicago, Morton, Orland Park, Oswego, Wheaton