LPL Financial

LPL Financial Welcomes Williams Tax & Financial Services

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SAN DIEGO, July 23, 2026 (GLOBE NEWSWIRE) -- LPL Financial LLC announced today that the advisors of Williams Tax & Financial Services have joined LPL Financial's broker-dealer and Registered Investment Advisor (RIA) platform. They reported serving approximately $340 million in advisory, brokerage and retirement plan assets* and join LPL from Cetera.

Based in Los Alamitos, Calif., Williams Tax & Financial Services is led by Steve Williams, CFP®, Enrolled Agent (EA). Williams is a second-generation financial advisor with nearly four decades of experience helping clients navigate complex financial decisions. He is joined by team members Jobel Rentino, EA, and Kirk Hunter.

A defining aspect of Williams Tax & Financial Services is its fully integrated model. The firm offers a streamlined, one-stop experience designed to help simplify clients' financial lives. The practice remains family-oriented, with deep roots in the community and a legacy that began with Williams' father, who originally founded a tax business.

Williams takes a holistic approach to advice, combining multiple disciplines to deliver a more complete financial picture. His process emphasizes simplicity and clarity, helping clients understand their projected income in retirement through streamlined, personalized planning. He also prioritizes building strong relationships, often taking time to understand clients' personal circumstances before discussing financial strategies.

"Throughout my career, I've believed that financial advice should be both personal and practical," Williams said. "We aim to give clients a clearer understanding of where they stand today and what they can expect in the future."

<h3> Why Williams Tax & Financial Services Chose LPL

Williams selected LPL for its scale, independence and enhanced technology capabilities, which he believes will improve the client experience.

"I wanted a platform that allows me to remain independent and make decisions in my clients' best interests, without being tied to specific products," Williams said. "LPL's technology and client-facing tools provide a more robust and transparent experience, helping clients better understand and manage their financial lives."

Marc Cohen, chief growth officer at LPL Financial, said, "We are pleased to welcome Steve to LPL. His commitment to delivering personalized financial guidance, combined with his client-focused approach, aligns with LPL's purpose to support advisors with the flexibility and capabilities they need to provide personalized advice. We look forward to supporting Steve and his team as they continue to grow and serve their clients."

Outside of the office, Williams enjoys staying active and engaged in his community. He is an avid surfer and soccer player, frequently coaches youth sports and is actively involved in his church. He lives in San Clemente, Calif., with his wife and four children.

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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 more than 32,000 financial advisors and the wealth management practices of approximately 1,100 financial institutions, servicing and custodying approximately $2.3 trillion in brokerage and advisory assets on behalf of approximately 8 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, 2025.*

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