Davis Aldana Joins Perennial Financial Services & LPL Financial

CHARLOTTE, N.C. – LPL Financial LLC announced today that financial advisor Davis Aldana has joined LPL Financial's broker-dealer, RIA and custodial platforms doing business as Aldana Financial and affiliating with Perennial Financial Services, a firm supporting LPL-affiliated advisors. Aldana reported having served approximately $155 million in advisory, brokerage and retirement plan assets,* and joins from Merrill Lynch.

Aldana entered into the world of wealth management by way of the fishing industry. He spent his youth working on boats in southern Calif., with aspirations to be a captain one day. While he does currently hold an active captain license, a moment of clarity led him into the financial world in college.

"Training to be a ship captain is actually a really good pathway to prepare you for financial advisory," said Aldana. "It's all about getting people home. Whether you are navigating challenging seas or the wealth management landscape, that guidance is pivotal to helping people work towards their goals."

Based in Los Alamitos, Calif., Aldana sought the kind of freedom that LPL provides in order to best serve his clients. Through the creation of Aldana Financial, he will continue to deliver a dynamic and comprehensive list of financial planning services to a client base that includes a range of business owners and retirees. Though his practice is steeped in processes, he remains flexible in adjusting parameters when adjustments are needed.

Aldana found freedom with LPL Financial

"Freedom was one hundred percent the reason I made the move to Perennial Financial Services and LPL Financial," added Aldana. "With LPL, you have several platforms you can choose from and a great amount of interest in helping us do the right thing for our clients. If I approach LPL and ask for a tool or service I need to do what I do even better, they listen and they respond. That kind of support is next level in this industry."

"We're so excited to bring Davis onto our team and know he'll continue to accomplish great things for his clients," said John Petrick, senior managing director at Perennial Financial Services. "We've been so fortunate to bring on not just incredible advisors, but really good people, which Davis epitomizes. We're building a synergistic team with a passion for helping others and placing clients' best interests first."

Scott Posner, LPL executive vice president, Business Development, stated, "Being recognized by Davis as a source of freedom is hugely validating. We have a mission to take care of advisors so they can take care of their clients, and this includes access to a broad range of investment solutions, innovative technology and cybersecurity platforms as well as operational support and compliance oversight. We welcome Davis to the LPL community and look forward to supporting the continued growth of his practice and the entire Perennial Financial Services team."

About Perennial Financial Services

Perennial Financial Services is an independent wealth management firm offering comprehensive and customized financial planning and investment management services. Founded in 2004, Perennial Financial Services offers a turnkey platform for transitioning advisors pursuing independence without the burden of running the day-to-day operations, compliance and oversight associated with owning and operating an RIA. For more information, please visit www.gohybridria.com.