Perennial Financial Services Welcomes Julian Locke, Expanding Client-Centered Financial Planning Services

Los Angeles, California- Perennial Financial Services is proud to announce the addition of Julian Locke CFP®, ChFC®, CRPC™, CDFA®, as Senior Vice President to their hybrid RIA, an existing large enterprise serving LPL Financial affiliated financial advisors. Locke brings a wealth of experience and a deep passion for helping people navigate their financial journeys with confidence and clarity.

Her expertise and dedication to delivering personalized services will enhance Perennial's ability to provide top-tier financial planning for clients seeking customized solutions.

Skilled at translating complex financial matters into understandable solutions, Locke has been producing results for her clients, and building long-term relationships with them, for two decades.

"My motivation comes from providing one-on-one service, building deep relationships with my clients, and helping them take the next steps in their lives, whatever that means to them personally," Locke said. "There is no cookie-cutter plan when it comes to financial planning. I listen to clients and we work together to decide what's next, with their thoughts, feelings and values supported by my education and experience."

Locke said she was drawn to Perennial Financial Services because of their ability to combine the resources and technology of a large firm with the personal touch and close-knit community of a smaller team. "Perennial stands out because of the way they equip financial professionals with the tools to offer their clients the best service possible, while maintaining strength, values and support for a human connection with both clients and colleagues," she said. "I am so impressed with how they balance traditional big firm support with the flexibility, focus and agility of a modern, small firm."

Locke's clear commitment to service is backed up by a track record of staying on top of industry trends and current events. She has earned and maintained the CERTIFIED FINANCIAL PLANNER®, Chartered Financial Consultant®, The Chartered Retirement Planning Counselor℠, and Certified Divorce Financial Analyst® designations on top of her college degrees and professional licenses. Throughout her accomplished career, Locke has served in compliance and performance leadership roles, mentored dozens of other advisors, and recruited more than 20 professionals into the industry. Her stellar reputation and long track-record of success will add tremendous value to Perennial Financial Services and their clients.

"We are thrilled to welcome Julian to the Perennial Financial team," said John B. Petrick, Senior Managing Director at Perennial Financial Services "Her dedication to her clients and passion for helping others is truly exceptional. Partnering with someone of her caliber, with such a strong skill set, leadership, and vision for the future of the industry, is a great privilege. At Perennial, our mission is to streamline, enhance, and strengthen our advisors' offerings, allowing them to run a high-performing, efficient practice while staying focused on what matters most – their clients. We look forward to a long-lasting partnership with Julian for many years to come."

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. Advisors associated with Perennial Financial Services are registered representatives with, and Securities offered through LPL Financial, Member FINRA/SIPC, and may be either investment advisor representatives of (1) LPL Financial, a registered investment advisor; or (2) Perennial Investment Advisors, LLC. a registered investment advisor. Perennial Investment Advisors, and Perennial Financial Services are separate entities from LPL Financial.