LORING WARD
A BETTER WEALTH EXPERIENCE

NEWS

For Immediate Release

William Chettle
Loring Ward
PH: (646) 285-4783
wchettle@loringward.com

Loring Ward Expands in Response to Record Growth

Firm Continues Commitment to Strong Advisor Support

San Jose, Calif. (August 15, 2017) As part of its commitment to high-touch service in helping financial advisors implement a prudent investment approach and run a more client-centric financial planning practice, Loring Ward has hired two new Regional Directors to join its Advisor Relations team.

Sean Brooks, who is based in Chicago, will cover Loring Ward's Great Lakes Region. He was previously a top business development officer at AssetMark, responsible for recruiting advisors and supporting them on the firm's platform. He also worked as an advisor with JPMorgan Chase in Scottsdale, Arizona. Sean can be contacted directly at sbrooks@loringward.com or www.loringward.com/sbrooks.

Mike Nixon, who is based in Omaha, will be responsible for Loring Ward's Central Region. For the last seventeen years, he was a top regional director with CLS Investments, where he worked closely with advisors to help them implement business efficiencies and grow their financial planning capabilities. Mike can be contacted directly at mnixon@loringward.com or www.loringward.com/mnixon.

According to Steve Atkinson, Loring Ward's Head of Advisor Relations, "Both Sean and Mike have extensive expertise helping advisors implement—or enhance—a comprehensive approach that unites investment management and financial planning. Like all our Regional Directors, they are very consultative and focused on helping advisors deliver a better client experience."

Through July of this year, Loring Ward has continued to expand at a record pace. As Atkinson notes, "Loring Ward's distinctive approach to advice is resonating with more and more people, and the need for a partner who will support and complement their practice has never been greater. As we grow, we will continue to hire experienced people like Sean and Mike to serve and support the advisors we partner with."

About Loring Ward

Headquartered in San Jose, California, Loring Ward (LWI Financial Inc.) is dedicated to helping independent advisors become the most trusted and valued professional in their clients' lives.

Loring Ward's Asset Class Investing philosophy combines market data, Nobel Prize-winning academic research and the latest discoveries in behavioral finance.

From Investment Management to Business Management to Practice Development, Loring Ward has almost three decades of experience giving advisors the tools, training and support to help them provide a world-class experience for their clients.

As of August 2017, Loring Ward has $15.7 billion in assets under management. For more information, please visit http://www.loringward.com.