Larry Lincoln Celebrates One Year at Heirloom Wealth Advisors

WILMINGTON, DE, UNITED STATES, October 28, 2024 /EINPresswire.com/ -- Heirloom Wealth Advisors, is excited to celebrate the one-year anniversary of Larry Lincoln, Senior Financial Advisor and Jennifer Galvin, Registered Client Associate joining our practice. Larry and Jen are based in our Wilmington, DE office and serve clients nationwide.

“Larry and Jen were outstanding additions to the Heirloom family,” said Dennis Valentino, Managing Principal of Heirloom Wealth Advisors. “Their mission to build enduring client relationships and deliver solutions that cater to their needs has been a perfect fit for Heirloom Wealth Advisors.”

Larry has 34 years of experience in the wealth management industry. Prior to joining Heirloom Wealth Advisors, he served as a financial advisor at RBC Wealth Management, Merrill Lynch, and Legg Mason.

“Going independent and leveraging the resources of Heirloom Wealth Advisors with support from Wells Fargo Advisors Financial Network has enabled me to expand my offerings to clients. During the first year of this partnership, I was also able to solidify a succession plan that will ensure the business continues to the benefit of current and future generations of clients,” said Lincoln.

About Heirloom Wealth Advisors

Heirloom Wealth Advisors, with offices in Wilmington and Lewes, Delaware; Allentown, Pennsylvania; Lutherville, Maryland; and Tysons Corner, Virginia is a full-service, independent wealth management practice committed to supporting individuals, families, and business owners as they build, manage, protect, and transition wealth. Lasting, meaningful, and open relationships with clients are at the foundation of their practice. When Heirloom works with clients, they want to know who they are, as this helps the firm get to the heart of client core values. Heirloom knows that their clients are more than their financial snapshots. Heirloom has been recognized by Forbes as one of the Best-In-State Wealth Management Teams for 2024. Visit heirloomwealthadvisors.com.

2024 Forbes Best-in-State Wealth Management Teams: Awarded January 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/22 - 3/31/23 (Source: Forbes.com). The

Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network (WFAFN), the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients.

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