EXECUTIVE PROFILE

PRIVATE CLIENT

LPL Financial

SONYA NOLAN, CFP®, MBA

ASSISTANT VICE PRESIDENT

Sonya started her career in financial services in 2005. In her current role as Assistant Vice President of Private Client at LPL Financial, Sonya provides sales and marketing support to advisors serving high-net-worth individuals, families, and Institutional clients. In helping advisors win, serve, and retain high-net-worth clients, Sonya advises on issues including sophisticated investment solutions, advanced financial and estate planning, concentrated equity positions, executive compensation arrangements, investment real estate, advanced insurance planning, business exit planning, and philanthropic planning.

Prior to her current role, Sonya was a Practice Management consultant to independent financial advisors. She has also served as an Associate Wealth Advisor and Branch Operations Manager at a boutique wealth management firm. Additionally, Sonya spent time working at a large financial management company in New York, where she conducted due diligence on Large Cap U.S. Equity money managers.

Sonya graduated Magna Cum Laude from The University of Arizona where she double majored in Psychology and Spanish Linguistics. She also holds a Masters in Business Administration from Georgetown University's McDonough School of Business. Sonya is a CERTIFIED FINANCIAL PLANNER™ practitioner and holds Series 7, 66, and 24 registrations through LPL Financial.