



Enzo Pellegrino: Ready for Growth

LPL Advisor Showcase

Partnering With You

Managing Your Business

Advisor Experience

Growing Your Practice

Business Strategy

Client Acquisition



Nurturing growth and relationships

As the Founder and CEO of TLWM Financial in San Antonio, Texas, wealth advisor Enzo Pellegrino tends to focus on the opportunities that lie ahead of him and the firm. "From our perspective, our future is extremely bright. And we're very excited about partnering with LPL, especially in the M&A space," says Pellegrino.

His approach to growth focuses on taking care of the people who trust them with their life savings. "Part of that is focusing on communication," says Pellegrino. "Staying in constant contact with people and doing the best we can through financial planning and investment management."

In this video, Pellegrino shares customized approaches to acquisitions he's found to be successful.



We're always looking at our future and focusing on what's coming a year from now, two years from now, five years from now, ten years from now.



- Enzo Pellegrino,
TLWM Financial

A personalized approach to M&A

Each acquisition looks different for Pellegrino. "We believe a customized approach is extremely important because the seller knows their clients best and what's going to work for them. At the heart of everything we're doing is taking care of each person."

Taking it a step further, when Pellegrino and his team acquire a practice, they have a strong commitment to develop a permanent presence in that geographic area and meet with those clients face to face. They make it a point to become involved with the community and make sure that when the advisor runs into their former clients that they're hearing how happy they are with their new team.

To help his business grow and thrive, Pellegrino and LPL's M&A team have worked together as true partners. "The M&A team has played a vital role in transferring clients from one advisor to another, and making sure that licensing and all of the other considerations happen seamlessly so clients have a great experience," he says. "We also appreciate the additional resources that LPL brings to the table through the virtual administration program. This allows us to have scale and capacity. And more importantly, it allows us to bid confidently going forward because it's such a great resource."

Advice for financial professionals looking to grow

If you're looking to grow your business through acquisitions, Pellegrino offers some areas to focus on:

- Scalability and repeatability — you want to make sure you can do this over and over again
- Capacity so that you can service the new clients you'll be taking on
- Surround yourself with a great team to help you take care of your new and existing clients
- Make acquisitions part of your business plan by including a budget and actively pursuing acquisitions
- Be ready when the time comes, jump on it, and don't let it pass you by

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