AHP

AHP FINANCIAL SERVICES INC.

An Independent Registered Investment Advisor

Retirement Planning Professionals

Our Experience. Our Knowledge. Our Process. Your Confidence.

The AHP Financial Services Client Experience involves regularly scheduled, face-to-face meetings with our advisors utilizing the most ground-breaking tools in the industry. The tools highlighted below allow our experienced advisors to help you easily understand your investments and overall financial picture, helping you to invest with confidence!

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STACIE MILLER
Client Services Specialist
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MILESTONES

OCTOBER 1997
Tim Holsworth is hired as President of newly created LACO Financial Services, an affiliate of Laine Appold & Co.

DECEMBER 1997
Aligned with Raymond James Financial Services as our broker-dealer.

JANUARY 2000
Laine Appold merges with Andrews Hooper & Pavlik PLC. LACO Financial Services becomes AHP Financial Services.

FEBRUARY 2005
Stacie Miller joins the team as a Client Service Specialist.

MARCH 2009
AHPFS achieves over $100 million in assets under management.

NOVEMBER 2012
Zach Turner joins the team as an intern and becomes a full-time Financial Advisor after college graduation.

OCTOBER 2013
AHPFS achieves $200 million in assets under management.

JANUARY 2019
Zach Turner is named AHPFS Vice President.

DECEMBER 2019
Darla Lessa joins the team as a Financial Advisor.

MONITOR YOUR FINANCIAL PLAN

Build your interactive financial plan with Raymond James Goal Planning & Monitoring software.

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riskalyze

What's your risk number? What's your portfolio's risk number? Do they match? Find out with our groundbreaking risk tolerance program.

*Riskalyze is an independent third party service provider and is not affiliated with Raymond James.

MORNINGSTAR®

We'll help track your investment performance and portfolio statistics with reports from the leading provider of independent research in North America, Europe, Australia and Asia.

*Morningstar is an independent research provider and is not affiliated with Raymond James.

RAYMOND JAMES®

Founded in 1962 | Approximately $896 billion in client assets as of 12/31/19

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