# Lawrence Financial Planning Amplifies Client Benefits Through Merger with Oasis Wealth Planning Advisors

Synergistic merger ensures continuity and depth of services for decades.

Lake Oswego, Oregon, Oct 09, 2023 (GLOBE NEWSWIRE) -- Oasis Wealth Planning Advisors (Oasis Wealth) and Lawrence Financial Planning (LFP) embrace synergies in a merger that places clients at the forefront, enveloped by additional expertise and a commitment to continuity. Tampa-based firm, LFP, headed by Julie Lawrence, CFP® as both President and Founder, identified Oasis Wealth as an optimal match for carrying forward the firm's commitment to clients specifically citing their mutual membership in the Alliance of Comprehensive Planners (ACP), and their fiduciary-based fee-only service model. Their shared commitment to providing unbiased advice and adhering to the highest ethical standards further strengthens their commitment to clients.

Both firms deliver holistic financial planning through fee-only services extending from retirement planning, investment management, and tax planning, among other disciplines. Their aligned management philosophies and synergistic offerings connect clients to greater services and solutions in demand from today's savvy investor. "The benefit to our clients was our primary objective," emphasized Lawrence. "This partnership provides expanded opportunities for our clients to flourish for decades to come."

Cumulatively, the firm now includes twelve key staff with expertise across several disciplines ranging from EnrolledAgent, Certified Financial Planner (CFP)®, Certified Public Accountant (CPA) and Personal Financial Specialist (PFS), Chartered Financial Analyst (CFA), Juris Doctorate (JD) and Master of Laws (LLM in Taxation), Certified

Kingdom Advisor (CKA), Financial Paraplanner Qualified Professional (PQFP). This merger brings together two highly respected wealth management firms that can serve clients throughout the Southeast. "More individuals nearing retirement are looking for deep expertise in retirement planning with a focus on tax planning. Combining the strengths of both firms will allow Oasis to serve our existing clients more deeply and will allow us to provide these specialized services to even more families. Whether we are meeting with clients in-person or by video, we now have the resources due to the expertise and dedication of a larger and passionate team," shared Steve Martin, CFP®, CPA, JD, LLM, President and Wealth Planning Advisor with Oasis Wealth.

With a combined client base of more than 200 households across the Southeast, this partnership will have a positive impact on the services and resources available to clients. The merger ensures firm continuity and sustainability, providing clients with uninterrupted access to expert guidance on their financial goals. "Our firms are committed to a smooth transition and continue to prioritize the financial well-being of our clients as well as the engagement of our great team," stated Mel Bond, CFP®, CFA, CKA, Chief Investment Officer and Wealth Planning Advisor with Oasis Wealth.

Together, the firms have hubs in Nashville, Tampa, and Atlanta and serve regions extending from Tennessee, to Florida, Georgia, and Alabama. This combination and the firm's ability to serve clients by video allows them to serve clients beyond the traditional borders. Their leadership team also includes Scott Winkler, CFP®, CPA/PFS, based in Atlanta. Leadership with each firm also holds ties to communities within National Association of Personal Financial Advisors (NAPFA) and the Garrett Planning Network.

James Fisher, JD, Partner and Vice President of Mergers and Acquisitions for FP Transitions shared, "Both Lawrence Financial Planning and Oasis Wealth Planning Advisors emphasized all the right commitments to their clients and employees – and each other – throughout the process." A leader in non-advocacy M&A consulting, FP Transitions supports more than one hundred advisory firm transactions every year, providing comprehensive consultative guidance to parties that ensures optimal outcomes for all stakeholders.

**About Oasis Wealth Planning Advisors**

Oasis Wealth Planning Advisors, LLC is an independent, Fee-Only registered investment and was founded in 2016 while the roots of Lawrence Financial Planning were planted in 2009. The firm carries 5 CFP® Practitioners and 7 staff members as of September 1, 2023. Members of Oasis Wealth Planning are affiliated with National Association of Personal Financial Advisors (NAPFA) and Alliance of Comprehensive Planners, two of the leading Fee-Only, fiduciary financial advisor associations advocating for high professional and ethical standards.

**About FP Transitions**

FP Transitions pioneered Succession Planning for financial advisors and continues to fundamentally transform how independent wealth management businesses identify, build and realize their equity value. Leveraging benchmarking data from 15,000+ certified business valuations and backed by a team of more than 60 professionals, FP Transitions delivers intelligent insights that enable multi-generational growth. Learn more at www.FPTransitions.com.

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