



Raffa Financial Services, Inc. Joins Lion Street

AUSTIN, TX – July 21, 2020 – Lion Street is pleased to announce Raffa Financial Services, Inc. as its newest Owner-Firm. Lion Street is a premier player in the financial and insurance industry, allowing Raffa Financial Services to offer more sophisticated solutions to their clients.

“Lion Street was created for professional advisors to provide resources and influence at scale unachievable in a local market.” said Bob Carter, Lion Street Founder and CEO. “The best get better when they unite around a common mission of providing the best client solutions.”

Based in Rockville, Md., Raffa Financial Services is an insurance and employee benefit brokerage and consulting firm serving the greater Maryland, Virginia, and Washington, D.C. area.

“As we began discussions with Lion Street, we started surveying our clients to see if they’ve done business continuity planning and know how to attract and retain top talent,” said Steven Heger, President of Raffa Financial Services. “What we’re finding is not many of our clients are prepared in the aforementioned areas; we need to service them, and we need help from Lion Street to do so.”

Raffa Financial Services exudes “Fierce Independence” and aligns perfectly with Lion Street’s culture and vision for firm growth. Lion Street is honored to have Raffa Financial Services become part of the family and looks forward to growing a great company together.

“Raffa Financial is a natural fit for Lion Street given the diversity of their clients, products, offerings and services,” said Justin Gladieux, Senior Vice President of Firm Development at Lion Street. “We are excited to help them grow their business insurance and executive benefits practice, as well as connect them to the resources available in the Lion Street Owner community. The depth and breadth of Raffa adds another holistic provider to our growing list of multi-line firms.”

ABOUT LION STREET

Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides elite independent life insurance and wealth advisory firms access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. Every affiliated financial advisor is a stockholder of Lion Street. Together, Lion Street’s Owner-Firms are strongly committed to building a fiercely independent, yet highly collaborative network of professionals. To learn more about Lion Street, please visit www.lionstreet.com or connect with us on [LinkedIn](#).



LION STREET®

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