



## LPL Financial Welcomes IHT Wealth Management to Broker-Dealer and RIA Custodial Platform

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**San Diego, CA – July 17, 2014** – [LPL Financial](#) LLC ("LPL Financial"), the nation's largest independent broker-dealer,\* an RIA custodian, and a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA), today announced that IHT Wealth Management has transitioned to the LPL broker-dealer and hybrid RIA custodial platform. IHT consists of a total of six experienced financial advisors and four administrative staff, which had supported client brokerage and advisory assets of approximately \$592 million, as of June 19, 2014.

Based in downtown Chicago, IL, IHT Wealth Management is a newly-launched independent financial advisory firm and hybrid RIA founded by industry veteran Steven Dudash. IHT will focus on providing holistic, customized wealth management strategies primarily to private retail mass-affluent and high-net-worth clients with investable assets ranging from \$250,000 to \$10 million and up.

IHT was established with the objective of providing a high-end advisory practice environment for wirehouse advisors who seek control over their individual books of business and an efficient, cost-effective business structure, while still enjoying the resources, credibility and wirehouse feel of a top-tier financial institution. IHT also intends to attract experienced advisors seeking a succession plan. They will find that transitioning to IHT will help enable them to develop an exit strategy that features increased flexibility. IHT's range of seasoned professionals would also enable retiring advisors at IHT to confidently place their clients with an appropriate new advisor based on each end clients' individual needs. In addition to its new offices in downtown Chicago, IHT expects to open two more offices in the metropolitan Chicago area in the coming months.

Steve Pirigyi, Executive Vice President of Business Development at LPL Financial, said, "We are very pleased to welcome IHT to LPL Financial. We are delighted that LPL Financial's deep commitment to offering financial advisors the benefits of independence, flexibility and choice, along with a full suite of practice management support and capabilities, has again attracted an enterprising team of top advisors to our platform. We are confident that the comprehensive support, technology, compliance, research and other tools and resources that we offer will provide IHT with a sturdy foundation from which they will be able to continue to attract other highly successful advisors to their new firm."

Steven Dudash, President of IHT Wealth Management, said, "We are excited about launching IHT as an alternative environment for advisors and we are extremely pleased with the exceptional support we have received from LPL. In meeting with several potential broker-dealer partners, we found LPL Financial to be most amenable and best-suited to accommodating our proposed business model, and we believe that their practice support and outstanding reputation will enable IHT to pursue our ambitious vision.

"We will provide a high level of service free from legacy costs and combined with a capacity for unbiased objectivity that a truly independent platform can offer. We look forward to working with LPL to provide our advisors a constructive home, so that they may best serve their clients' interests and help them to work toward their long term-financial goals," he concluded.

\*Based on total revenues, Financial Planning magazine, June 1996-2014

### About IHT Wealth Management

IHT Wealth Management is a team of experienced wealth management professionals dedicated to the design and implementation of customized, comprehensive financial strategies for mass-affluent and high-net-worth investors. IHT's disciplined, goals-based approach and its objective advice are focused on helping its clients create a financial plan that aligns with their vision for the future. The firm's areas of specialty include wealth management, comprehensive financial planning, legacy planning, retirement planning, college planning, insurance, and charitable giving. Founded by seasoned financial advisor Steven Dudash in 2014, IHT is based in Chicago, IL, and expects to open additional branches in the Chicago metropolitan area. For more information, please visit [www.ihtwealthmanagement.com](http://www.ihtwealthmanagement.com).

### About LPL Financial

LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA), is the nation's largest independent broker/dealer (based on total revenues, Financial Planning magazine, June 1996-2014), an RIA custodian, and an independent consultant to retirement plans. LPL Financial offers proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 13,700 financial advisors and approximately 720 financial institutions. In addition, LPL Financial supports approximately 4,500 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms and technology solutions. LPL Financial and its affiliates have more than 3,000 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit [www.lpl.com](http://www.lpl.com).

Securities and advisory services offered through LPL Financial. A registered investment advisor, member FINRA/SIPC.

Investment advice offered through IHT Wealth Management, a registered investment advisor and separate entity from LPL Financial.

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