



## LPL Financial Welcomes CKW Wealth Management

Jan 17, 2019

CHARLOTTE, N.C., Jan. 17, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that CKW Wealth Management has joined LPL Financial's broker-dealer and corporate registered investment advisor platforms, aligning with LPL Financial enterprise firm Private Advisor Group (PAG). The firm reported that its advisors served approximately \$175 million of client brokerage and advisory assets\*. The firm joins from 1<sup>st</sup> Global.

The firm is made up of financial advisors Natacha Smith and Mike Stieglitz CFP® and a team of CPA partners. They have two New Jersey offices, in Sparta and Chester, and support clients throughout the country. Collectively, they provide clients and companies with wealth management, tax and consulting services tailored to their clients' unique growth-oriented needs.

Smith is making a return to LPL. She left to join Stieglitz, but Smith said, "It became apparent to me that we needed to go back to LPL." Stieglitz added, "LPL is the right choice for us because it has the size and scale to support our ability to grow. And I believe LPL cares about their advisors. We've seen that with the continued focus to enhance their platform to benefit advisors and their clients. And there's a human element they provide. When we need answers, we get them from real people, right away."

"I also believe that the technology and resources that LPL provides are more robust," Smith said. "ClientWorks, in particular, is capable of aggregating everything a client wants in one location, making the process easier and more efficient for all of us."

"We are delighted that CKW has made the decision to join LPL Financial and Private Advisor Group," said Abby Salameh, PAG chief marketing officer. "Natacha's familiarity with LPL played a role in moving her team back to LPL and PAG so they could have the support their firm needs to not only succeed, but to thrive. It is wonderful to have her back as part of the PAG family."

Rich Steinmeier, LPL Financial managing director, and divisional president, Business Development, said, "With our size and scale, we are uniquely positioned in the industry to be able to provide the services and resources advisors rely on to serve their clients as well as the pricing and support that helps them to maximize growth. We welcome the CKW Wealth Management team and congratulate PAG on their continued growth."

Read about other firms that recently joined LPL in the [News and Media section](#) of LPL.com.

### About LPL Financial

LPL Financial is a leader in the retail financial advice market and the nation's largest independent broker-dealer\*\*. We serve independent financial advisors and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and grow thriving practices. LPL enables them to provide objective guidance to millions of American families seeking wealth management, retirement planning, financial planning and asset management solutions. [LPL.com](#)

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. CKW Wealth Management is not an affiliate of LPL Financial and offers tax and consulting services separate from and apart from LPL Financial.

\*Based on prior business and represents assets that would have been custodied at LPL Financial, rather than third-party custodians. Reported assets have not been independently and fully verified by LPL Financial.

\*\*Based on total revenues, *Financial Planning* magazine June 1996-2018

LPL Financial, CKW Wealth Management LLC and Private Advisor Group are separate entities.

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