



LPL Financial Welcomes Community First Bank of Indiana

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CHARLOTTE, N.C., Feb. 13, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that Community First Investment Group (Community First), the investment program offered at Community First Bank of Indiana, has joined LPL Financial. The program has aligned with Bankers' Bank Financial Services Network (BFSN), an Office of Supervisory Jurisdiction (OSJ) supported by LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. The Community First investment program reported having managed approximately \$75 million of client brokerage, advisory and retirement plan assets*. The program joins from LaSalle Investment Management.

Community First is based in Kokomo, Ind., and the program is made up of financial advisors Bart Erwin and Larry Rolland, along with office support from Karen Munsey. Together, they provide wealth management services to professionals and small businesses in the local community. Over a span of 15 years, the investment program has supported the bank's growth, now one of the largest banks in the county, Rolland said. The advisors are heavily involved in their community, including serving on the boards of local charities, which has led to a successful referral-based business.

"LPL was attractive because of the advanced technology and resources available to us. We have found that ClientWorks is a great asset for us, making it easy for us to access client information, monitor data and evaluate risks all in one integrated platform," said Rolland. "When you factor in Bankers' Bank, this decision provides us with all the benefits of a large institution but with a small community feel."

"We are excited Community First has chosen us to support their investment program," said Jeff Zimmer, first vice president, Bankers' Bank. BFSN provides diverse investment services support with a community-minded commitment to building strong relationships and providing personal service. Serving banks across Iowa, Illinois, Wisconsin and Indiana, Zimmer said, "We help community banks compete with larger banks by leveraging the size and scale of LPL. We have a long-standing relationship with LPL and we consider them a great partner. With their continuing partnership, we look forward to catapulting our growth, working towards welcoming more banks to our platform this year."

Craig Kamis, LPL Financial executive vice president, Institutional Business Development, said, "We congratulate Bankers' Bank on their growth and warmly welcome the Community First team to LPL. The capabilities of LPL and Bankers' Bank Financial Service Network combine to deliver an innovative value proposition that includes practice management support and innovative tools that can help the Community First program capitalize on their potential and increase value with their customers and their community."

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](#)

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*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

Community First Bank and Bankers' Bank are not registered Broker/Dealers and are not affiliated with LPL Financial.

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