



## LPL Financial and Gladstone Wealth Group Welcome Breandan Kelly

Feb 27, 2019

CHARLOTTE, N.C., Feb. 27, 2019 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#), a leading retail investment advisory firm and independent broker-dealer, today announced that financial advisor Breandan Kelly has joined LPL Financial, aligning with Gladstone Wealth Group (Gladstone). Kelly will be supported by LPL Financial's broker-dealer and corporate registered investment advisor (RIA) platforms. Kelly reported that his firm managed approximately \$110 million of client brokerage, advisory and retirement plan assets\*. He joins from Wells Fargo Advisors.

Kelly creates a new Gladstone branch in Fort Myers, Fla., launched through Gladstone's Partnership Program. The program helps to establish a business structure for advisors, providing operational support and utilizing LPL Financial's integrated platform and custodial and brokerage services. His firm is supported by two staff members, including Catherine Byrd, director of operations, and Kathy Kelly, client services assistant.

"I chose to join Gladstone because of the numerous capabilities available with the Partnership Program and the effectiveness of the executive team," Kelly said. "Combined with the freedom of independence and the tools and resources provided by LPL, I will have the time to focus on serving my clients and better position my business for growth."

"We are excited that Breandan chose to leverage our Partnership Program to build his independent business. His energy and professionalism are exactly what our firm looks for in advisors," said Richard Frick, managing partner and CEO of Gladstone. "We value our advisors. Their success is our success. Our affiliation with LPL delivers value by providing the resources and innovative solutions that help us and our advisors evolve. Their scale is key to enabling our firm's continuous growth."

Rich Steinmeier, LPL Financial managing director and divisional president, Business Development, said, "As an independent business owner, having a supportive environment can be tremendously valuable. We are proud to work in partnership with Gladstone to deliver scale and stability that empowers advisors to build successful businesses. We welcome Breandan to LPL and congratulate Gladstone on growing their advisor community. We will continue to invest in the capabilities and solutions that will help them address the evolving needs of their businesses and their clients."

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

### About LPL Financial

LPL Financial (<https://www.lpl.com>) 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.

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

Gladstone Wealth Group provides investment advice through Gladstone Institutional Advisory, LLC, a registered investment advisor and separate entity 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 and client numbers have not been independently and fully verified by LPL Financial.

\*\*Based on total revenues, *Financial Planning* magazine June 1996-2018  
LPL Financial and Gladstone Wealth Group are separate entities.

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